



YE2011 Marketing Report and 2012 Marketing Plan To The City of Branson

Branson/Lakes Area Chamber/CVB

March 22, 2012

Presentation Overview

- **Tornado Response**
 - **Economic Indicators**
 - **2011 Travel Industry and 2012 Travel Outlook**
 - **2011 Branson Performance**
 - **2012 Marketing Plan**
 - **2012 Creative Campaign**
-



Tornado Response Summary

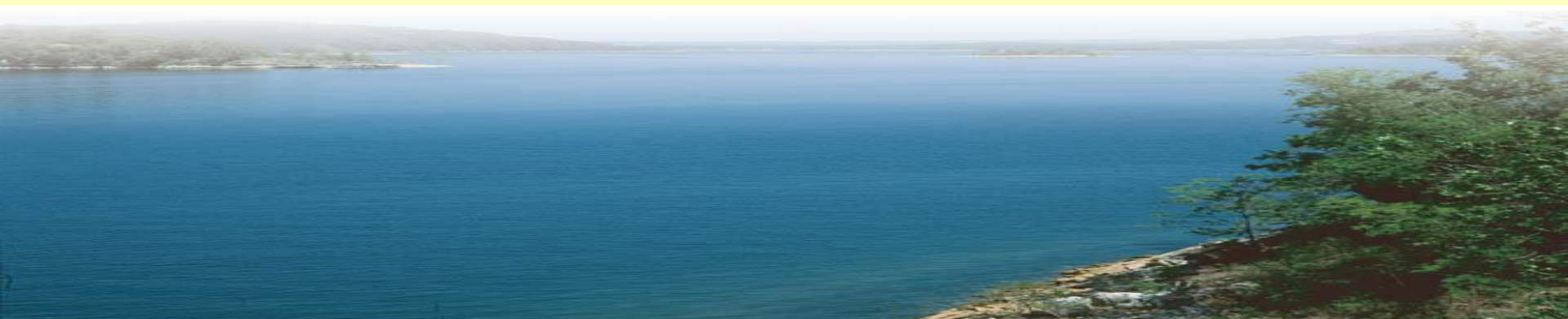
The background image is a landscape photograph. The top half of the image is dominated by a dark, turbulent sky filled with heavy, dark blue and grey clouds. A bright, golden light source, likely the sun, is positioned just above the horizon line, partially obscured by a layer of lighter, yellowish clouds. This light creates a strong, shimmering reflection that stretches vertically down the center of the image, illuminating the surface of the water. The bottom half of the image shows a calm body of water with a dark, silhouetted shoreline in the distance. The overall mood is dramatic and somewhat ominous, which is fitting for a document about tornadoes.

Branson/Lakes Area Chamber of Commerce & CVB



What is our **MISSION?**

To provide leadership for the continued growth of a viable, sustainable economic and environmental climate for the Branson/Lakes Area in order to enhance the quality of life for our community, our visitors and our future.



Branson/Lakes Area Chamber of Commerce & CVB



COMMUNITY AFFAIRS (Chamber)



TOURISM MARKETING (CVB)

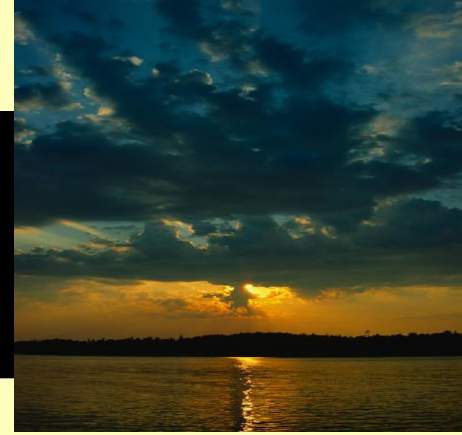


Branson Chamber of Commerce Community Outreach



- Reached out to affected area businesses and residents through multiple daily email blasts and Facebook posts, sharing pertinent tornado recovery resources including items on: AmeriCorps (volunteer coordination/recovery assistance), Red Cross, Salvation Army, area job fairs, donations, avoiding scams, doing business locally and updates regarding area business openings/closings.

Branson Chamber of Commerce Community Outreach



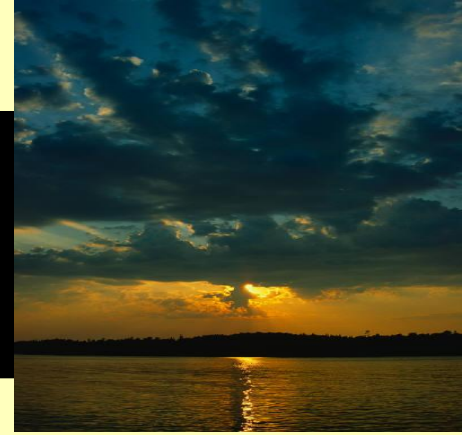
- **Created page on BransonChamber.com** that contained information for businesses, including links to disaster response and preparedness resources for Missouri, MO Department of Insurance, and the City of Branson; downloadable documents included "Information for Front-Line Employees," "10 Steps to Help You Rebuild," "How to Avoid Scams," and "How to Help Your Employees".

Branson Chamber of Commerce Community Outreach



- In partnership with the local Emergency Response Team and VolunteerBranson.org, **created online portal for volunteers to sign up with AmeriCorps St. Louis; ACSTL opened their office in the BLACC/CVB boardroom on February 29**, matching homeowner needs to the skill sets of volunteers. Since opening, 1,500+ registered volunteers have poured almost 4,700 hours into the community.

Branson Chamber of Commerce Community Outreach



- **ACSTL remained in Branson through March 16** – efforts have now transitioned to:

Tri-Lakes VRC

First Presbyterian Church

400 W. Pacific Street

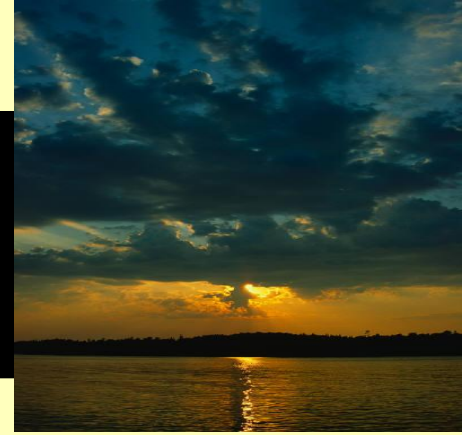
Branson MO 65616

Volunteers: 417-334-2007

Homeowners: 417-332-1538

trilakesvrc@gmail.com

Branson Chamber of Commerce Community Outreach



- **The Taney County Business Development Partnership**, in cooperation with the Missouri Small Business and Technology Development Centers, compiled a **disaster resource guide for small businesses that was distributed through a door-to-door campaign** by BLACC/CVB employees.

Branson CVB

Marketing & Public Relations



- **In consultation with media buyer Camelot Communications (Dallas, TX), suspended all regional and national television advertising for one week**
- **Retained services of crisis communications firm Geiger & Associates of Tallahassee, FL (Katrina, BP Oil Spill, etc.)**

Web Search Interest: "branson tornado"

United States, Last 30 days

Categories: [Arts & Entertainment \(0-10%\)](#), [News \(0-10%\)](#)

⚠ The categorization taxonomy of Google Insights for Search has been updated during December 2011. [Learn more](#)

⚠ An improvement to our geographical assignment was applied retroactively from 1/1/2011. [Learn more](#)

Totals ⓘ

"branson tornado" 7

Interest over time

☐ Forecast ⓘ ☒ News headlines

[Learn what these numbers mean](#)

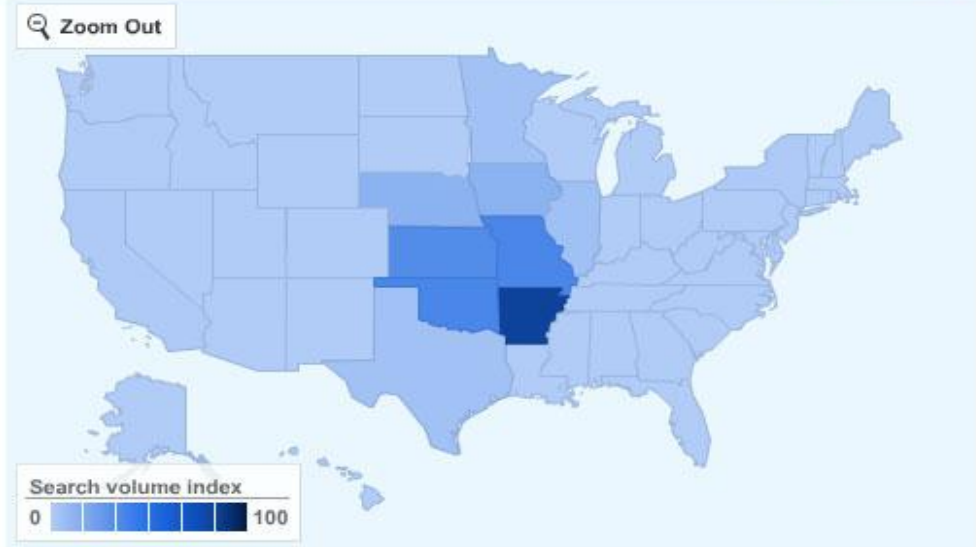


[Embed this chart](#)

Regional interest

ⓘ Subregion [Metro](#) [City](#)

1.	Arkansas	<div></div> 100
2.	Oklahoma	<div></div> 44
3.	Missouri	<div></div> 44
4.	Kansas	<div></div> 40
5.	Iowa	<div></div> 16
6.	Nebraska	<div></div> 16
7.	Illinois	<div></div> 7
8.	Texas	<div></div> 6
9.	Minnesota	<div></div> 6
10.	California	<div></div> 1



[View change over time](#) ⓘ

Branson CVB

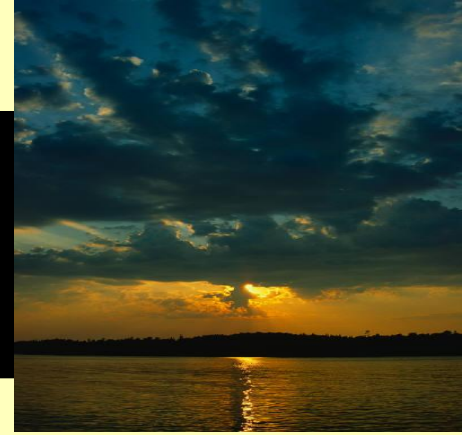
Marketing & PR



- **Opened lines of communication** with Mayor Presley, City Administrator Kruithof, Communications Director Anderson, Fire Chief Martin, City/CVB/Chamber staff and other spokespeople
- **Conducted video walking tours** with CVB President Ross Summers, MO Division of Tourism Director Katie Steele Danner, and Steve Hartley of Dick's 5 & 10 and posted on Explorebranson.com and on YouTube – more than 31,000 views through 3/19.

Branson CVB

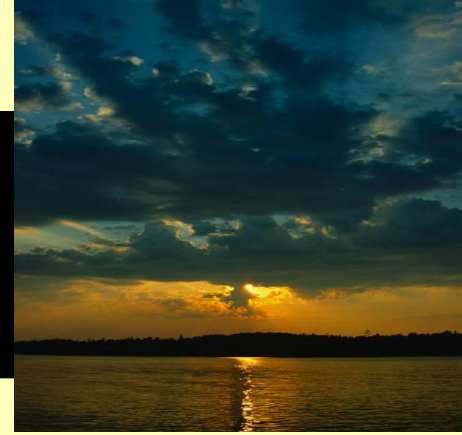
Marketing & PR



- **In conjunction with Suddenlink, developed a 30 second “Branson is Open for Business” PSA** featuring Clay Cooper and Ross Summers for 2-week distribution in the 4-state area – Arkansas, Missouri, Louisiana and Mississippi
- **Conducted more than 100 television and radio interviews** in the region
- **Developed daily informational press releases** to be sent out to media (more than 5,000 national and regional media outlets)

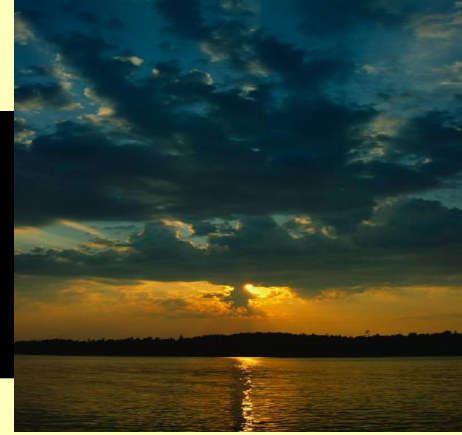
Branson CVB

Marketing & PR



- **Developed daily information updates** posted on www.ExploreBranson.com, talking points for spokespeople and **storm updates/messaging to 15,000 tour operators, travel agents and meeting planners**
- **Responded quickly to media reports that were inaccurate** and provided correct information
- **Provided material for social media outreach,** YouTube video series, and marketing messages -- over 1,000 interactions

Branson CVB Marketing & PR



- **Two Branson CVB E-Blasts to 83,000 newsletter subscribers**
- **Monitored media reports multiple times per day** regarding recovery and provided positive articles for social media outreach
- **Provided frequent information updates** for media, website, spokesperson talking points and front line personnel talking points

Branson CVB

Marketing & PR



- **Continue to distribute weekly information updates** for media, website and modify talking points for spokespeople and front line staff as needed
- **Continue to manage transition timeline** for scaling back post storm “open for business” messaging and returning to “business as usual” messaging

BRANSON TORNADO IMPACT STUDY



Prepared by H²R Market Research | March 2012

Branson CVB

Tornado Impact Survey

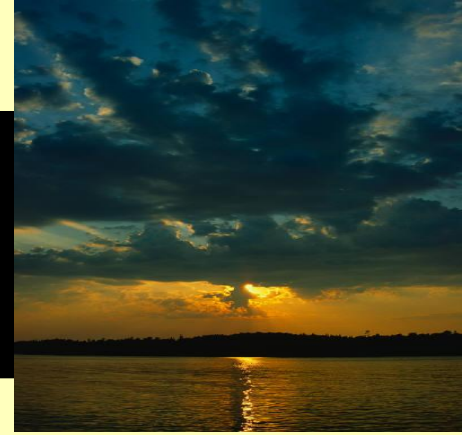


- As we learned in 2011, **nationwide media coverage of natural disasters can have a very real impact on a destination's performance.** On March 9 we began a study to determine:
 - **Travelers' awareness** of tornado and perception of damage to area's entertainment and lodging inventory;
 - **Impact of tornado on travelers' consideration** of Branson as a travel destination in 2012 (future trips delayed or cancelled, etc.);

Branson CVB

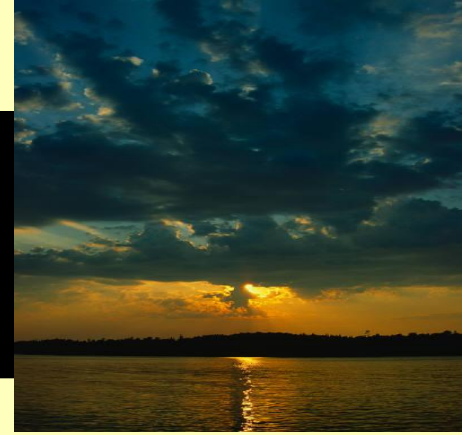
Tornado Impact Survey

- **Overall: long-term impact of the tornado appears to be comparatively minor.** Widespread severe weather, lack of fatalities, fragmented national news coverage and rapid community response helped dispel image of total devastation.
- **While many travelers were aware of the tornado, the lasting impression for most is that Branson will be back to business as usual in no time at all.**



Branson CVB

Tornado Impact Survey



- Nationwide, 45% would “consider” visiting Branson. This runs as high as 68% in the core market, but falls to only 18% beyond 650 miles; **when asked why they would not consider visiting Branson, only 3 of 333 responses mentioned the tornado.**
- **Of those who would consider Branson, more than two-thirds (68%) said they were likely or very likely to visit this year (2012);** the tornado was referenced just 9 times in 419 comments by these folks (2.1% of unaided responses).

Branson CVB

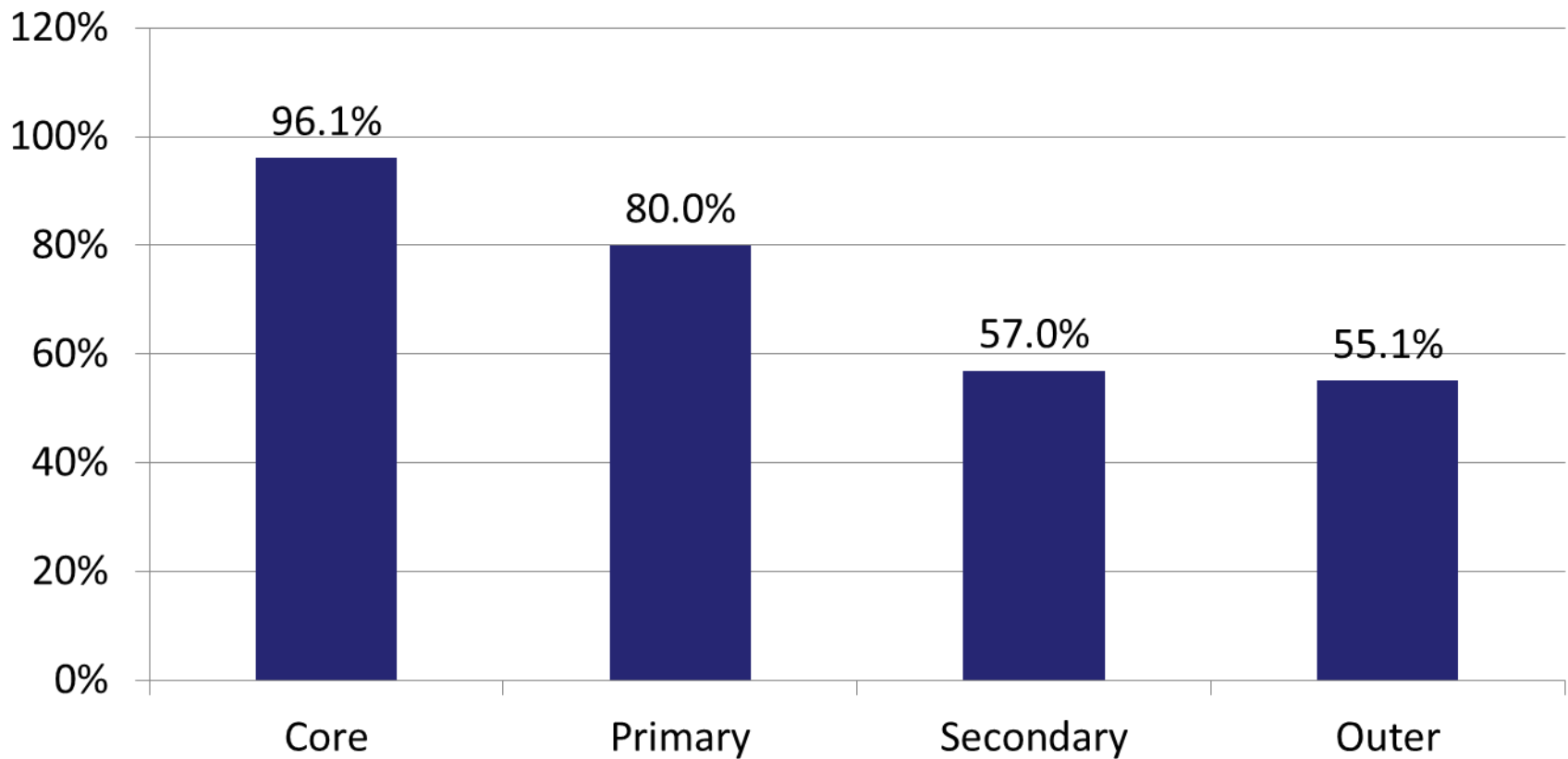
Tornado Impact Survey



- **Those not likely to visit gave a broad number of reasons, but the tornado was mentioned only 6/86 comments.** (Gas prices were mentioned just 4 times and economic issues were mentioned 19 times).
- When asked directly, however, most travelers nationwide (72%) had heard a tornado hit Branson, with awareness highest in the core (96%) and primary markets (80%) and dwindling with distance. **Only 57% of the secondary markets (301-650 miles) and 55% of outer markets (651+ miles) were aware of the tornado.**

Aware a Tornado Hit Branson

Over 70% nationwide were aware of the tornado, but awareness faded quickly with distance.



Branson CVB

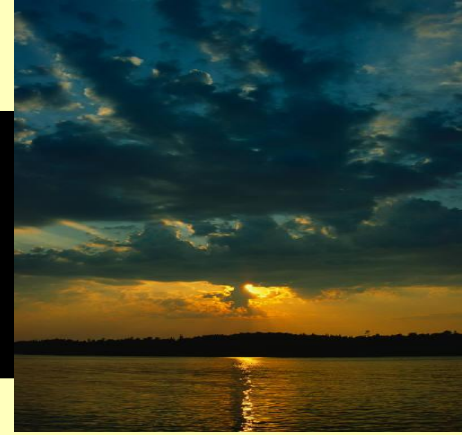
Tornado Impact Survey



- **Most travelers from all distances agreed with provided statements indicating Branson suffered comparatively little damage and would be open soon, and all rated the harshest statement (direct hit, most closed) dead last in agreement; it appears that the rapid message management enacted by the City of Branson, the BLACVB and others paid dividends in minimizing negative publicity.**

Branson CVB

Tornado Impact Survey

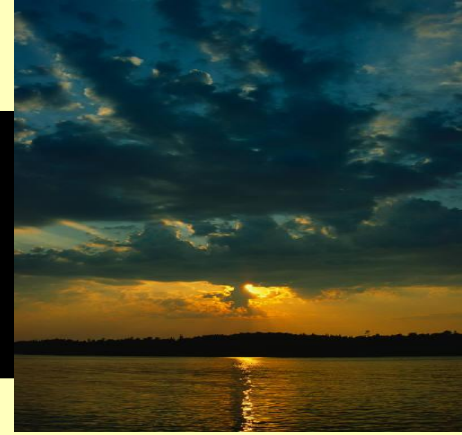


- **MOST IMPORTANTLY**, most indicated their intent to visit Branson was actually a little stronger than it was last year. The net variance in *nationwide* intent to visit compared to last year was actually up by about 2.0% (although intent varies by distance).
- The biggest takeaway we see so far is that **many were not even aware of the tornado -- and that those who were knew that the impact was not devastating.**

Branson CVB

Tornado Impact Survey

Gasoline prices were barely mentioned as reasons for not visiting Branson this year... and the average tipping price that gasoline would have to reach before these folks would start cancelling trips continues to escalate -- when originally asked in 2008, the average respondent said they would stop traveling if gasoline hit \$4.00 a gallon; by 2010 that number had increased to \$4.50. **In this study it has moved all the way up to \$4.69 among those who would consider visiting Branson.**



Economic Outlook



U.S. Unemployment Rate

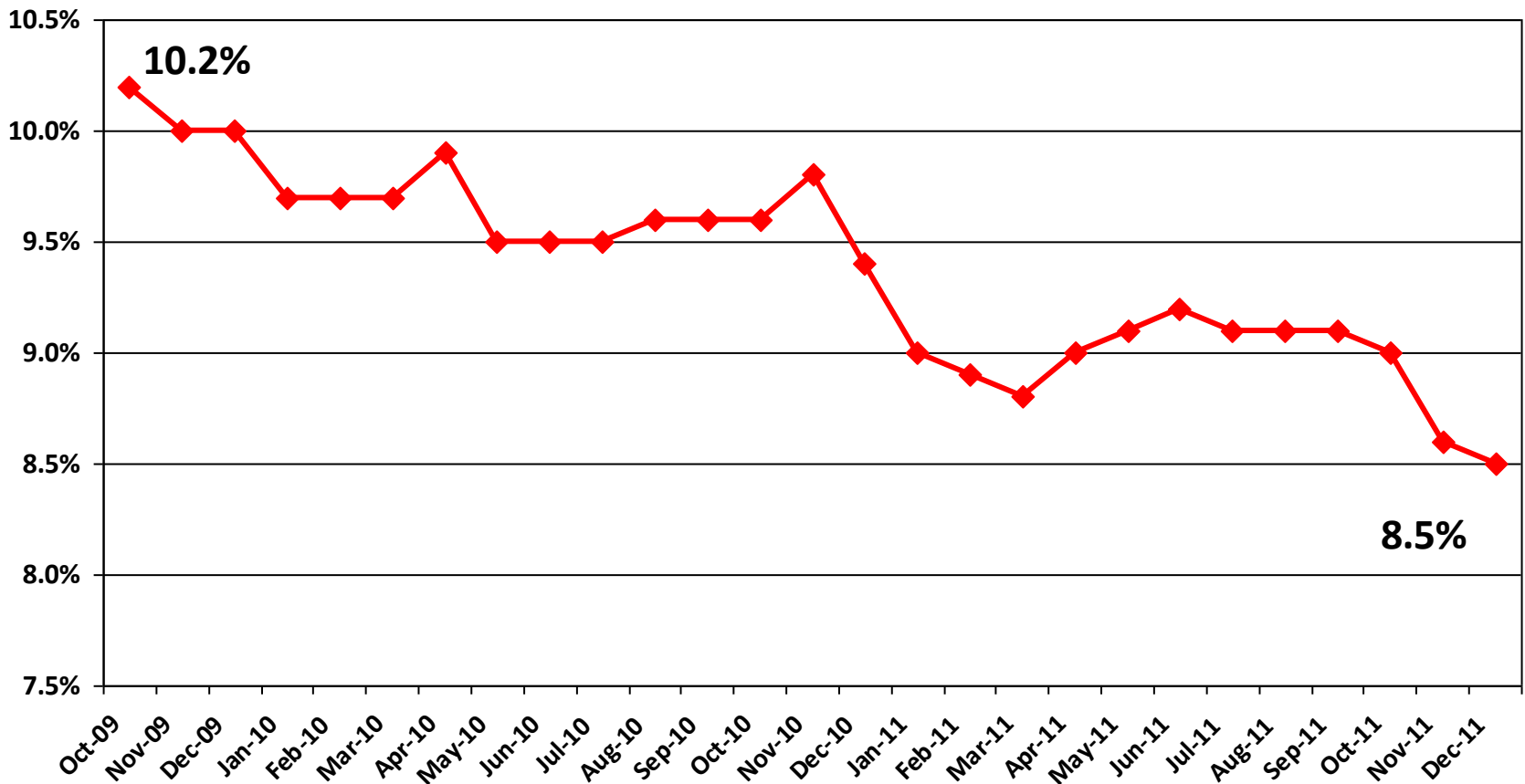


8.5%

Unemployment is
now at **8.5%** and has
remained under 9% for
the past 3 months.

U.S. Unemployment Rate

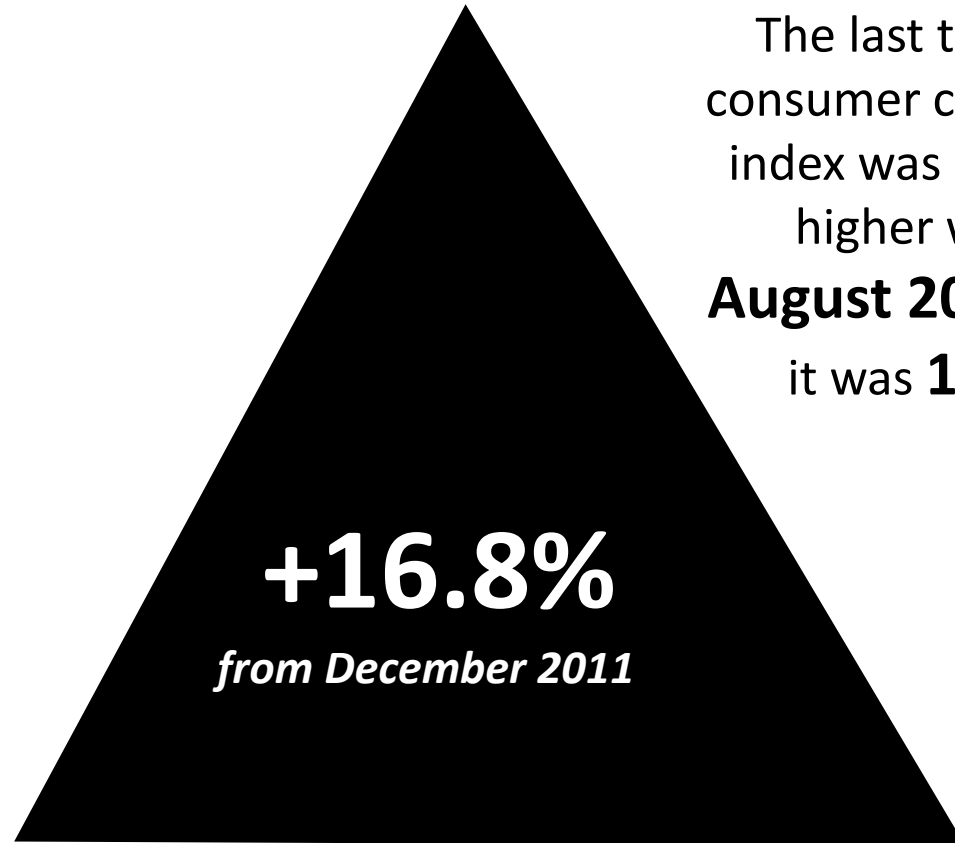
U.S. unemployment is finally headed in the right direction.



Source: Bureau of Labor Statistics

Consumer Confidence

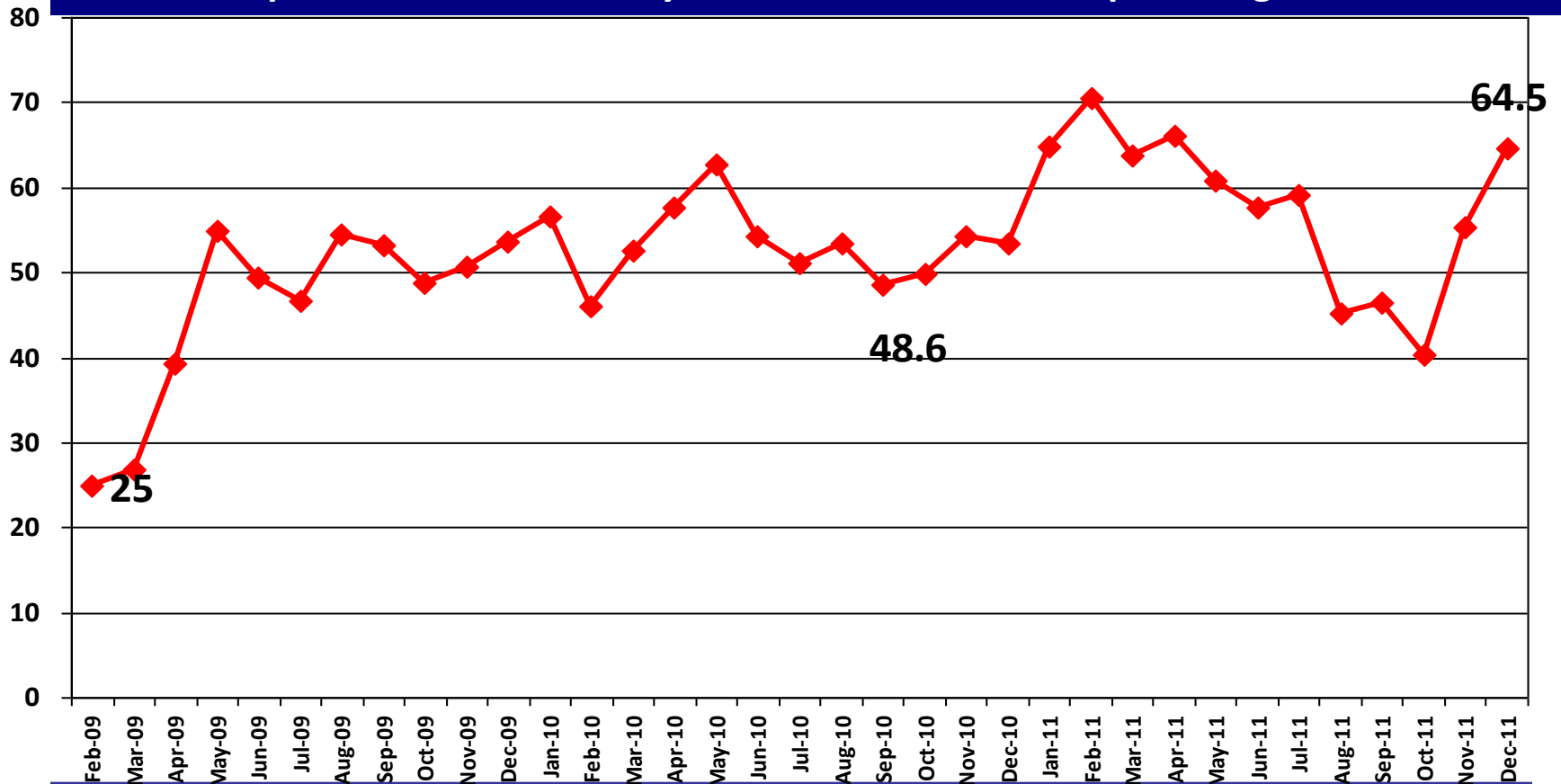
Consumer Confidence now stands at **64.5** where **90** is considered necessary for sustainability and 100 is required for growth.



The last time the consumer confidence index was at 100 or higher was in **August 2007** when it was **105.0**.

Consumer Confidence

Consumer confidence has been bouncing back in recent months. An index of 90 is required for sustainability and 100 is needed to represent growth.



Source: The Conference Board

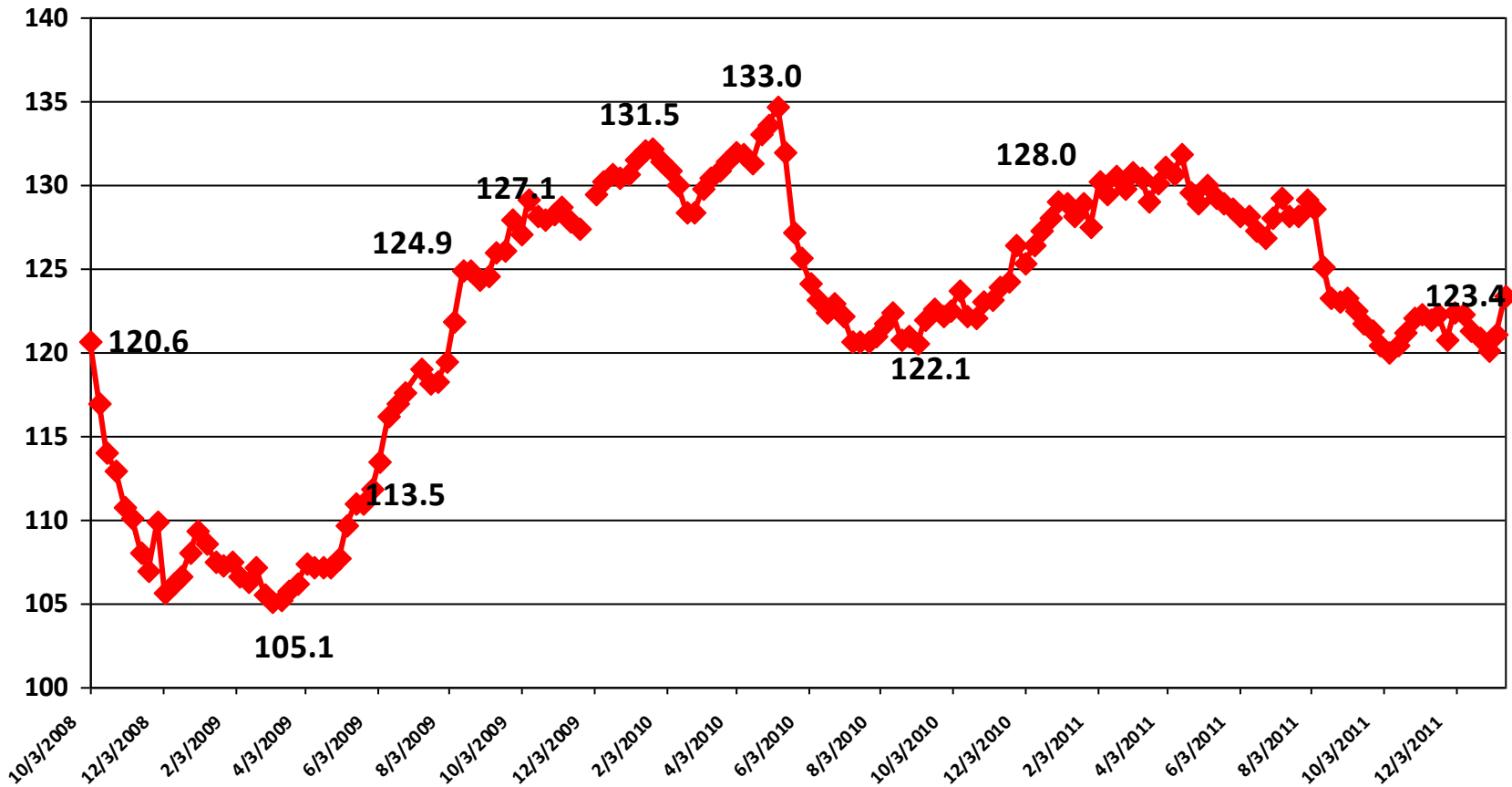
Index of Weekly Leading Indicators



The Economic Cycle Research Institute's Weekly Leading Index® (WLI) for the U.S. has increased 2.7 percent since the end of December to 123.4, but annualized growth remains at -7.5%.

Weekly Leading Index (WLI)

The WLI, which dipped in the summer months, bounced back a bit in the fall.



Source: Economic Cycle Research Institute

U.S. Average Gasoline Prices

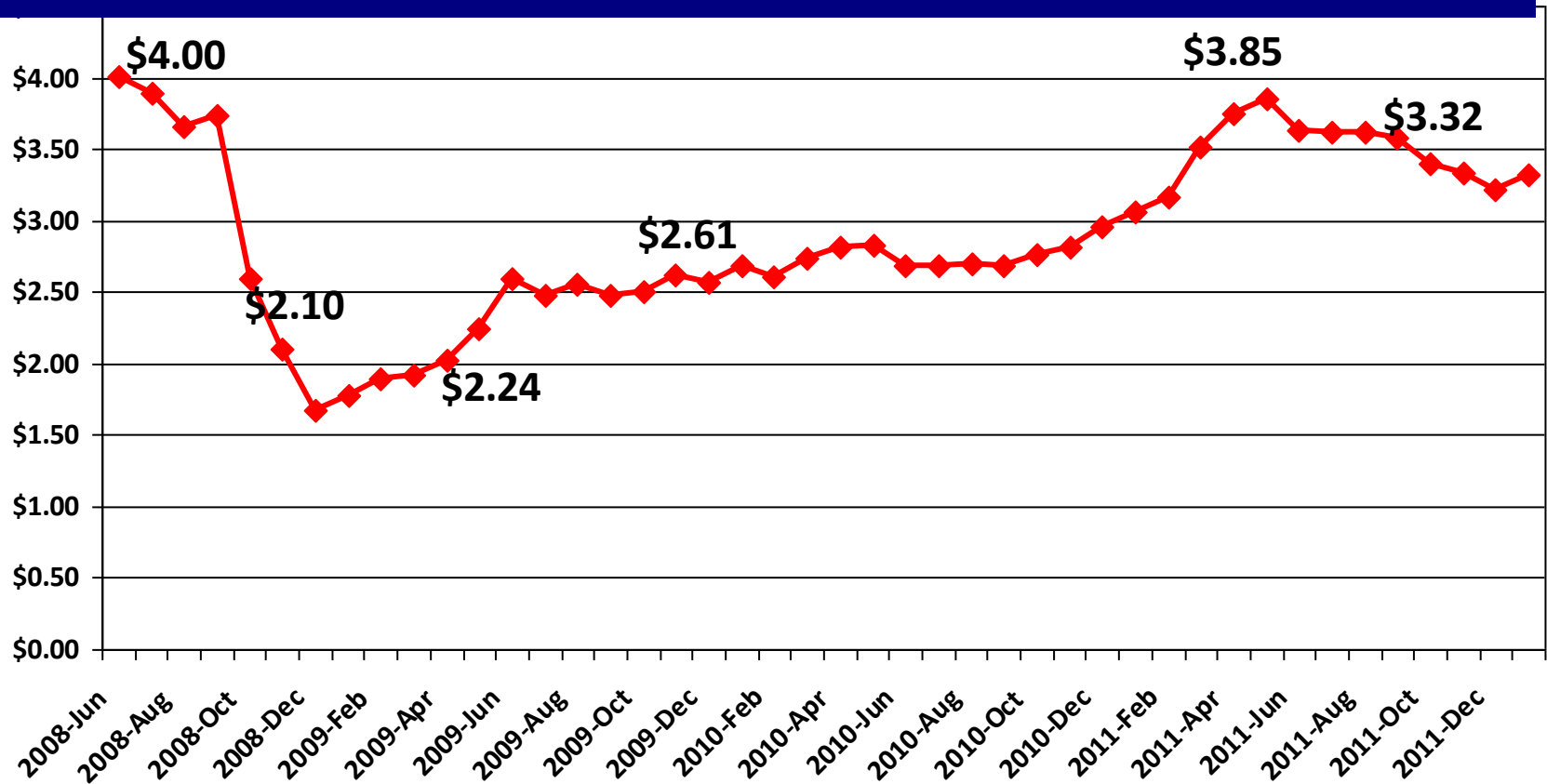
The average U.S. Regular Convention Retail Gasoline Price averaged **\$3.32 per gallon the last week of January 2012**, up 3.0% from last month and up 8.4% from January 2011.



+8.4%
*from
Same Time Last Year*

Average U.S. Gasoline Prices

Gasoline prices shot up in the spring of 2011, but fell throughout most of the year afterwards—until last month.



U.S. Travel Performance



2011 Travel Industry Performance Fared Well

According to the U.S. Travel Association, domestic leisure travel generated 1.547 billion person-trips (+2.2%) as domestic travel spending surged 7.5% over 2010 levels. Hotel room demand was up 5.1%, domestic air enplanements increased by 1% and most major destinations saw their visitor counts increase, e.g., Las Vegas (+4.5%), Hawaii (+3.9%), and Orlando (+3.7%).

2011 TRAVEL INDUSTRY

Smith Travel Room Demand

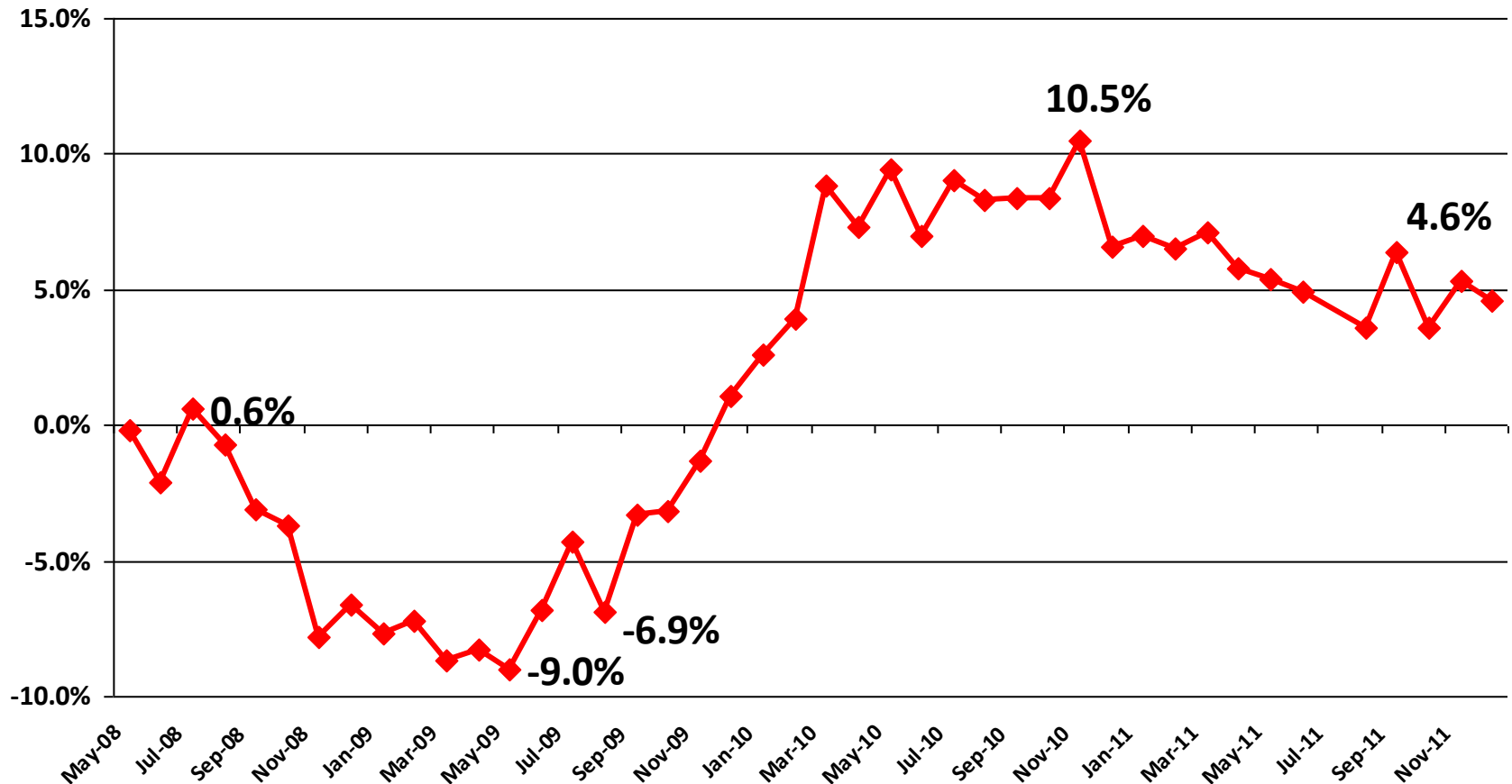
U.S. room demand
has increased for 25
consecutive months--
after posting 16
consecutive months
of decline.



+5.0%
in 2011

Smith Travel Research

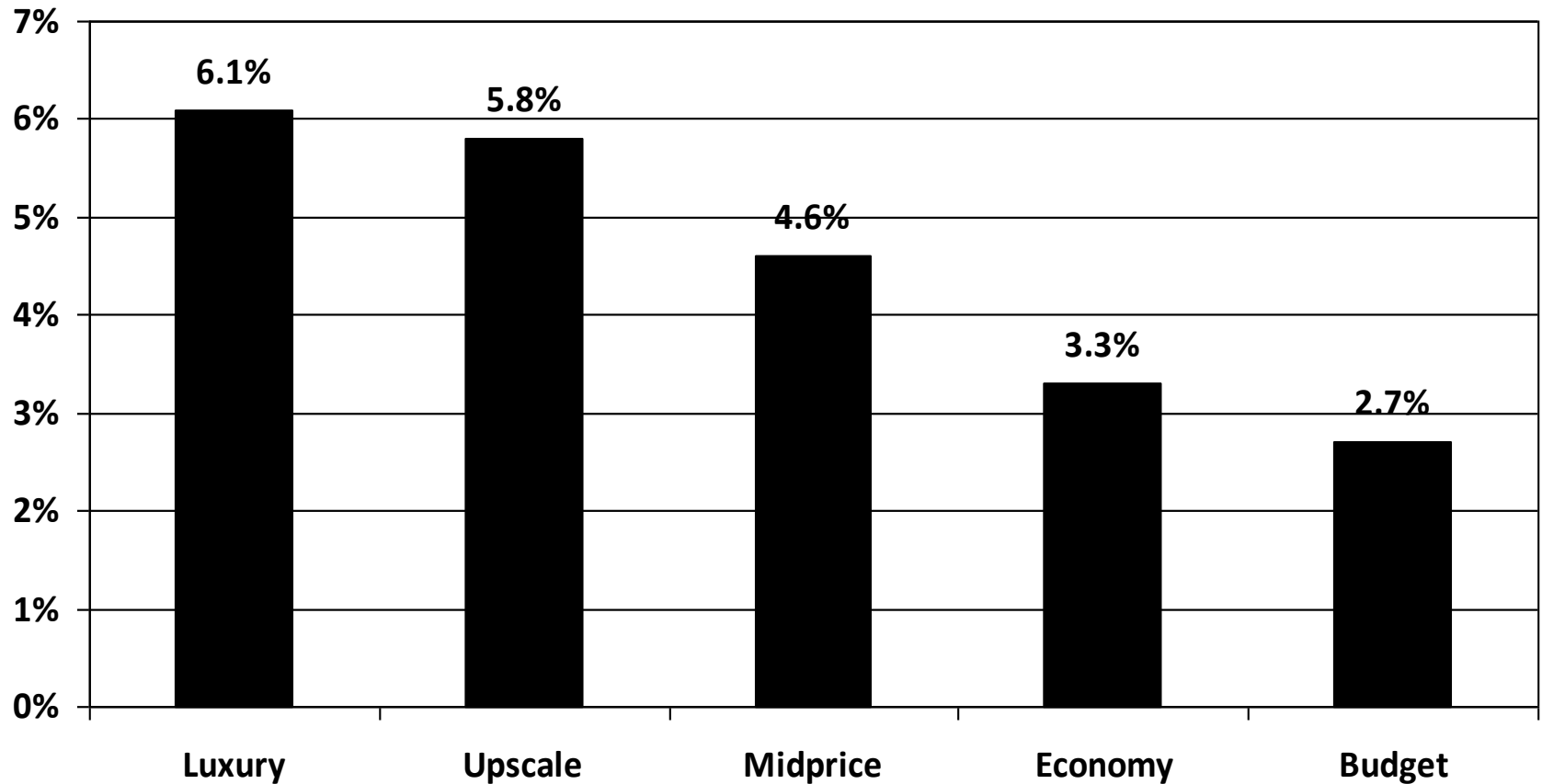
U.S. Room Demand Variance



Source: Smith Travel Research

Smith Travel Research

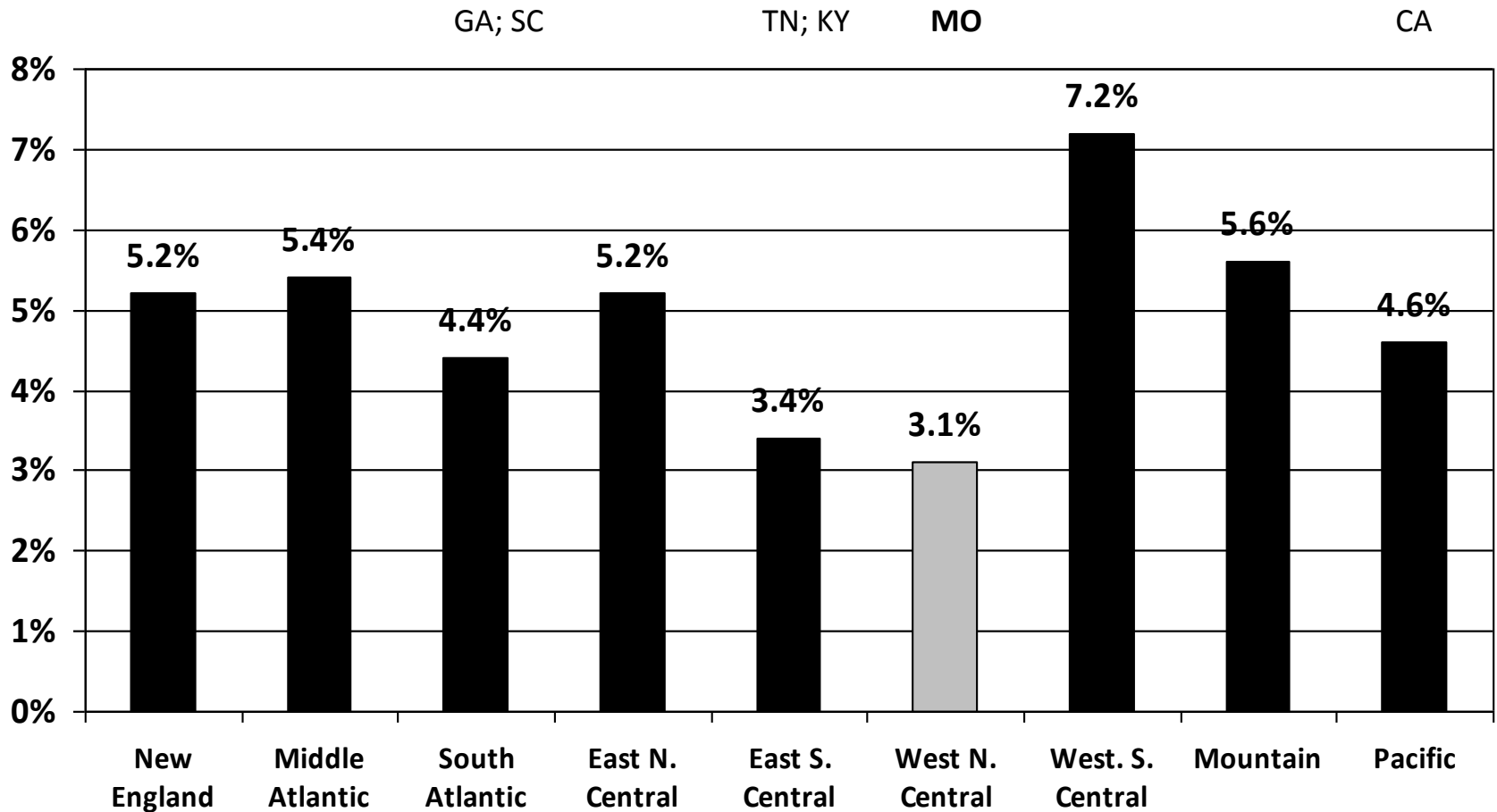
Room Demand by Price



SOURCE: Smith Travel Research data for the USA as a whole

Smith Travel Research

Room Demand by Region



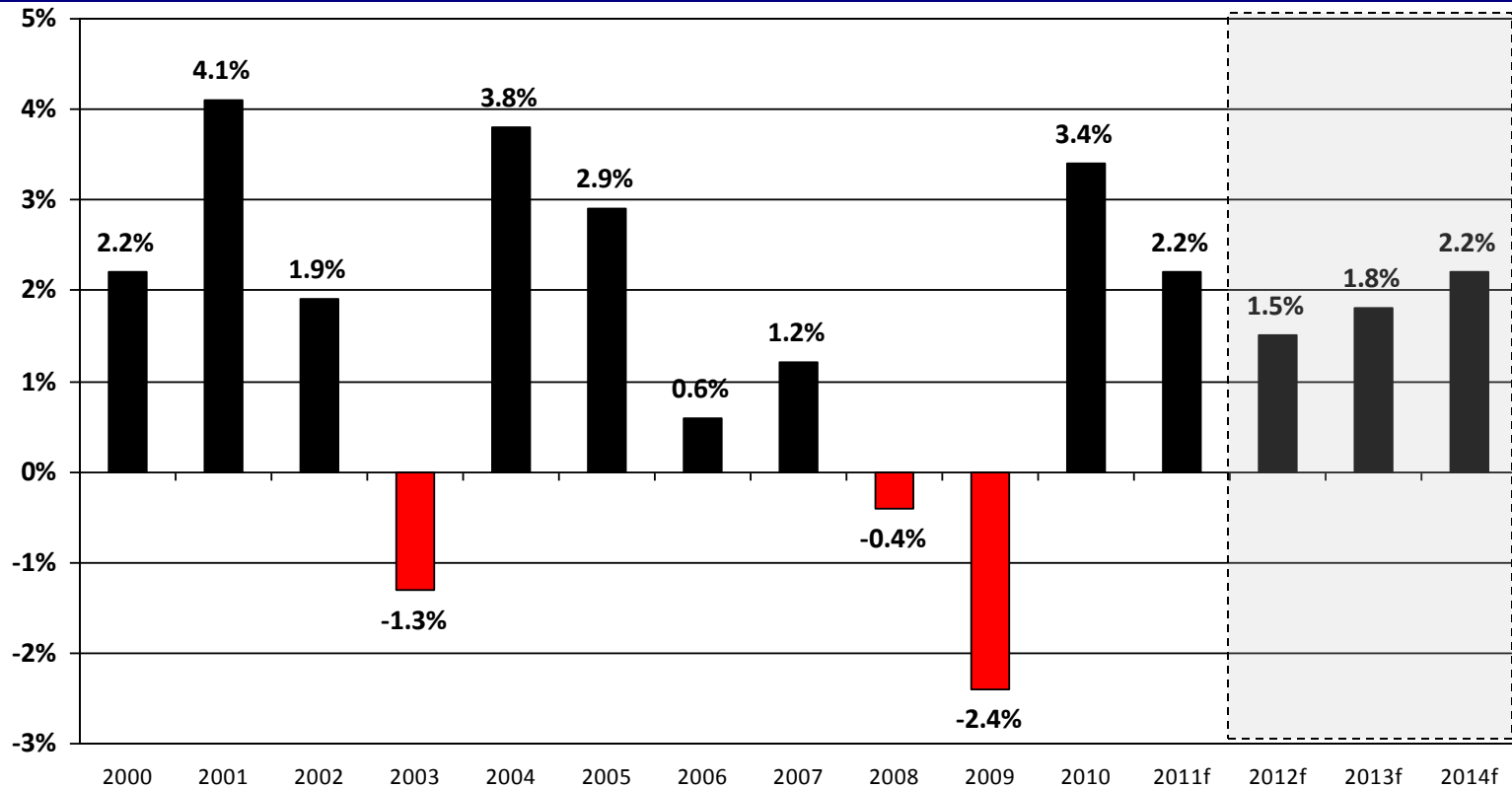
SOURCE: Smith Travel Research data for the USA as a whole

Travel Industry 2012 Outlook



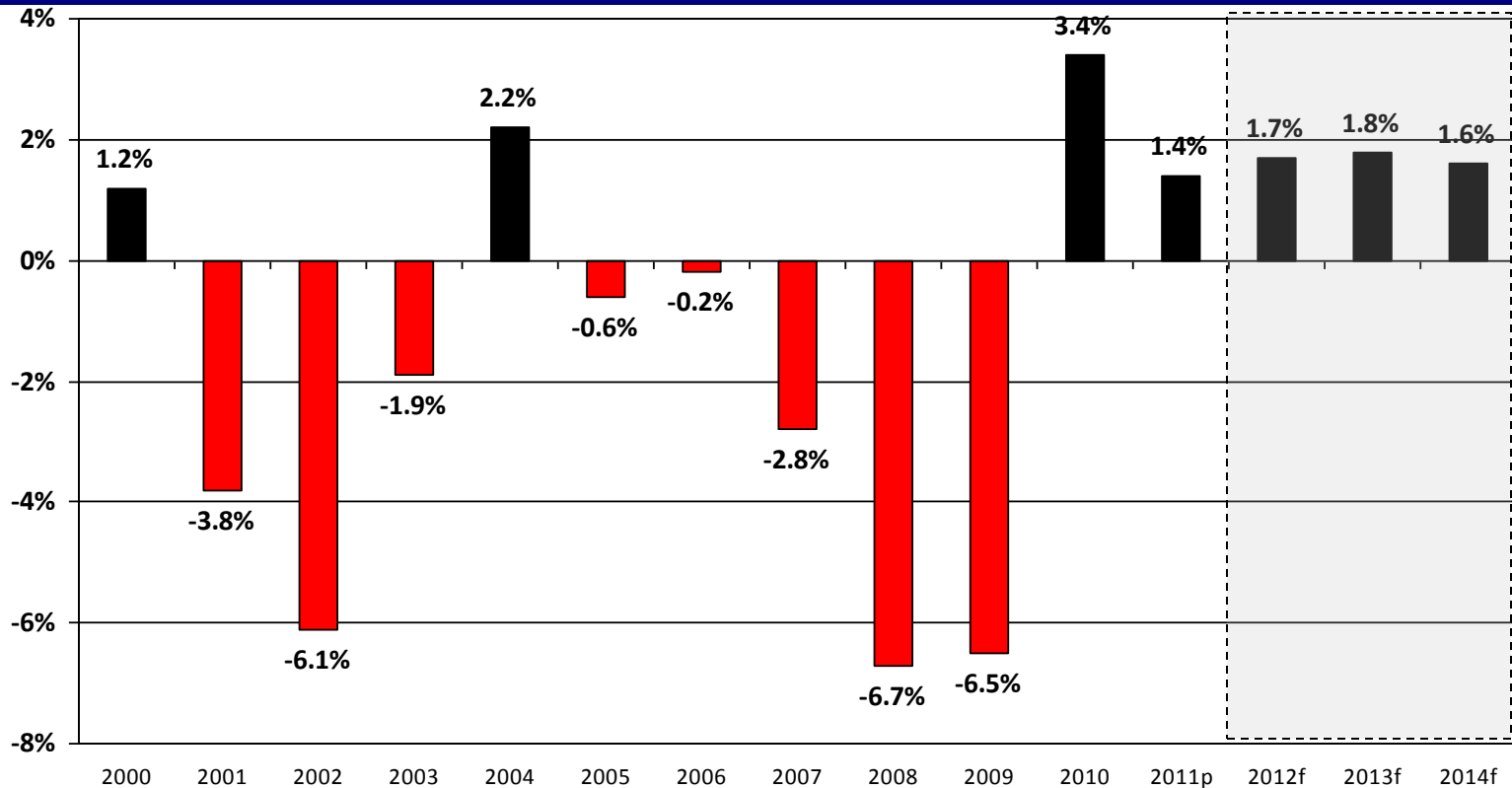
Leisure Trip Forecast

Industry experts expected leisure trips to rebound (+2.2%) in 2011, but experience somewhat slower growth in 2012 (+1.5%).



Business Trip Forecast

Business travel posted its first increase in six years in 2011 (+1.4%) and will continue moderate growth for the foreseeable future.



Branson Performance

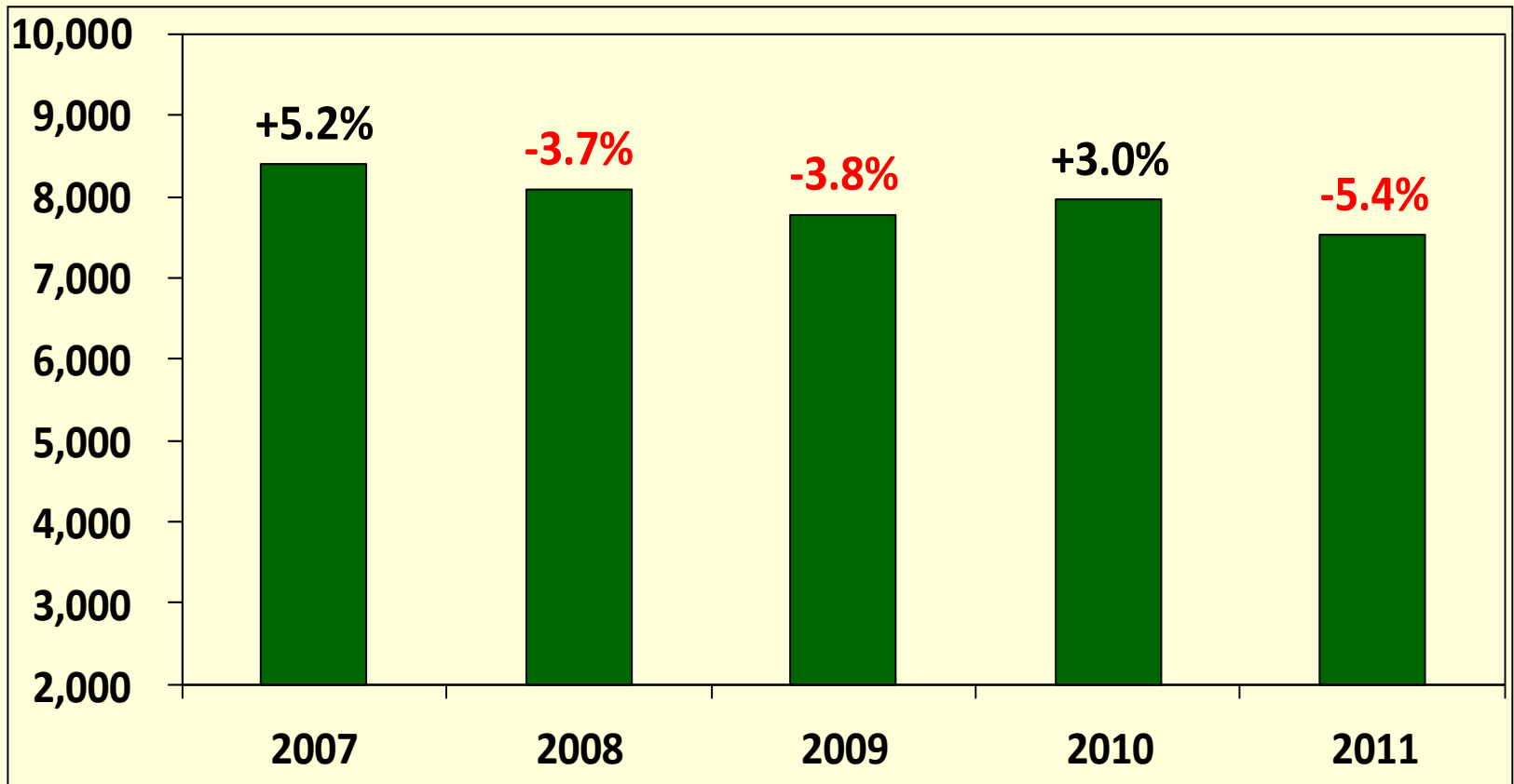


Branson's Overall 2011 Performance



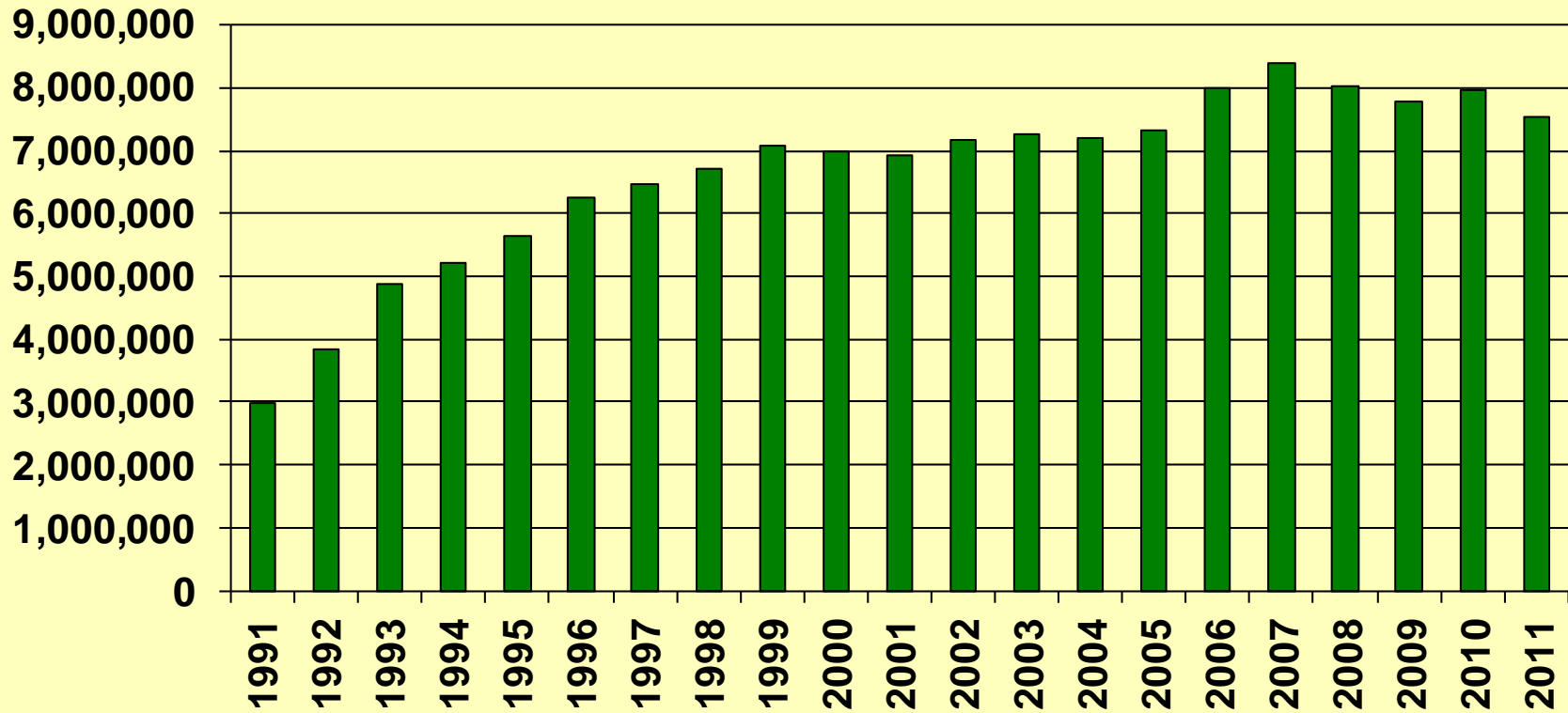
-5.4%

Branson Visitation YE 2007-2011

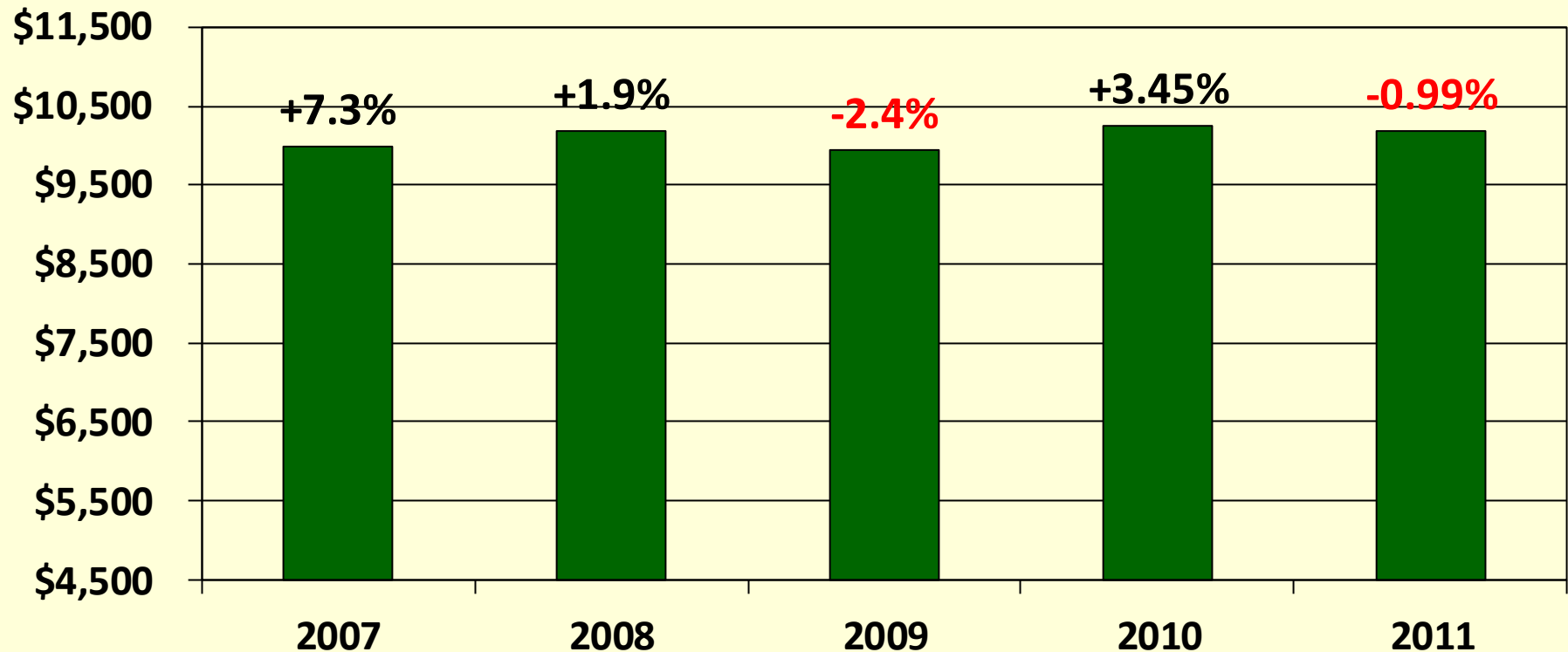


Source: H2RMarket Research based upon STR, regional tax collections

History of Branson Visitation 1991 - 2011

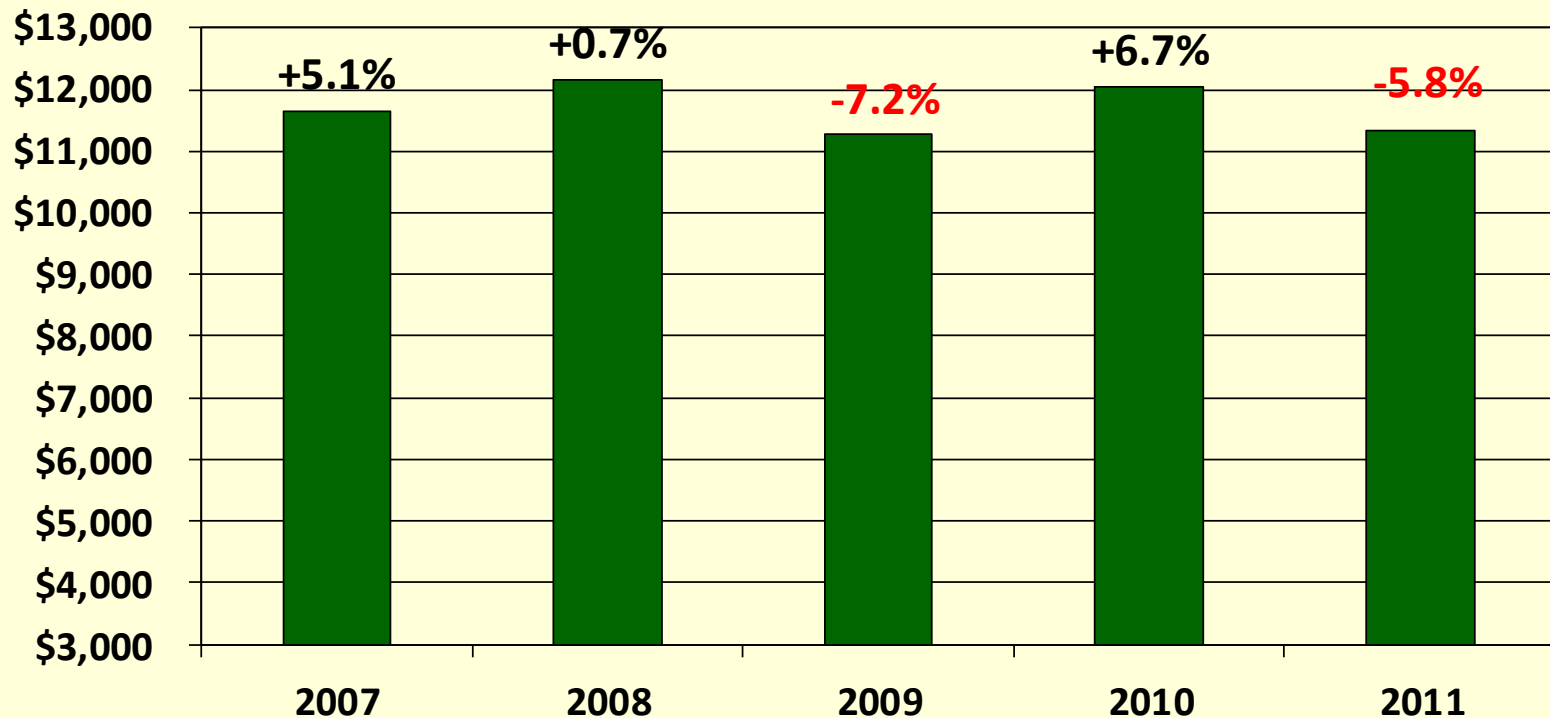


City of Branson Sales Tax YE 2007-2011



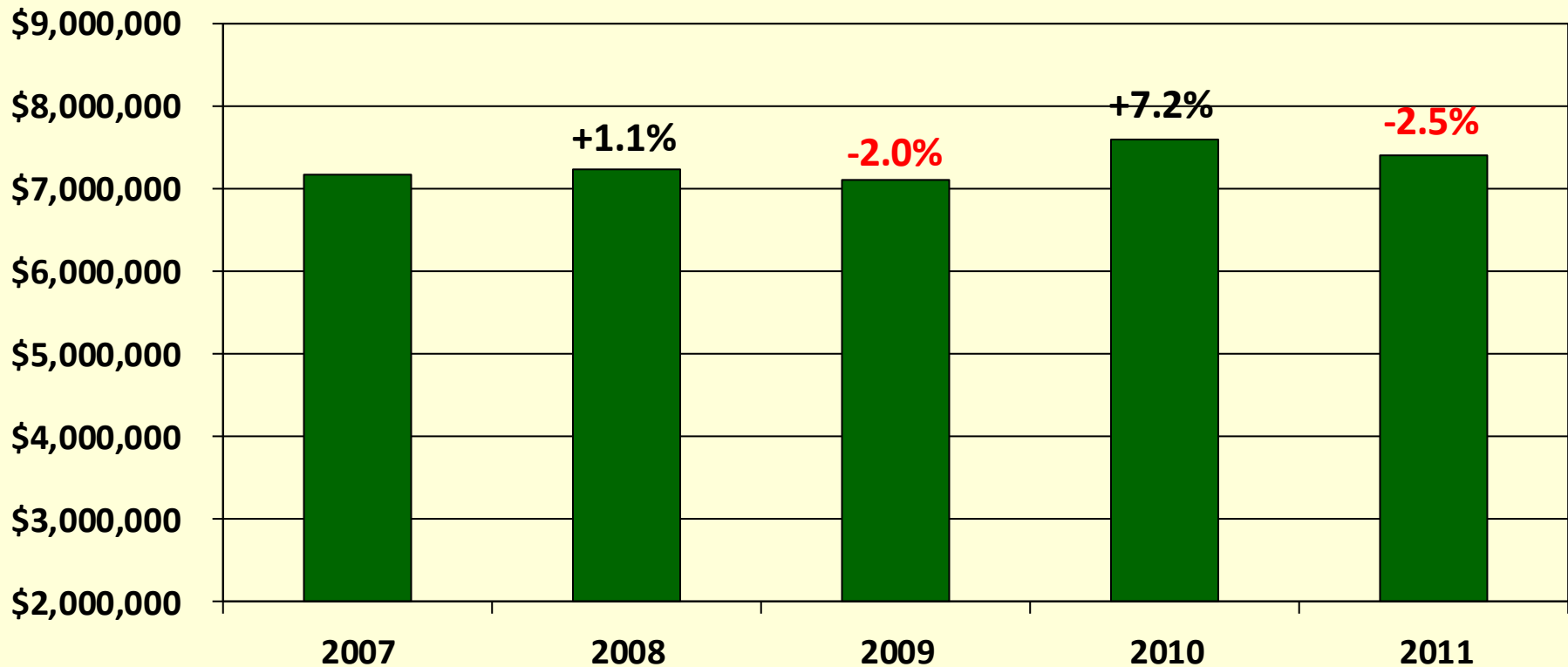
Source: City of Branson

City of Branson Tourism Tax YE 2007-2011



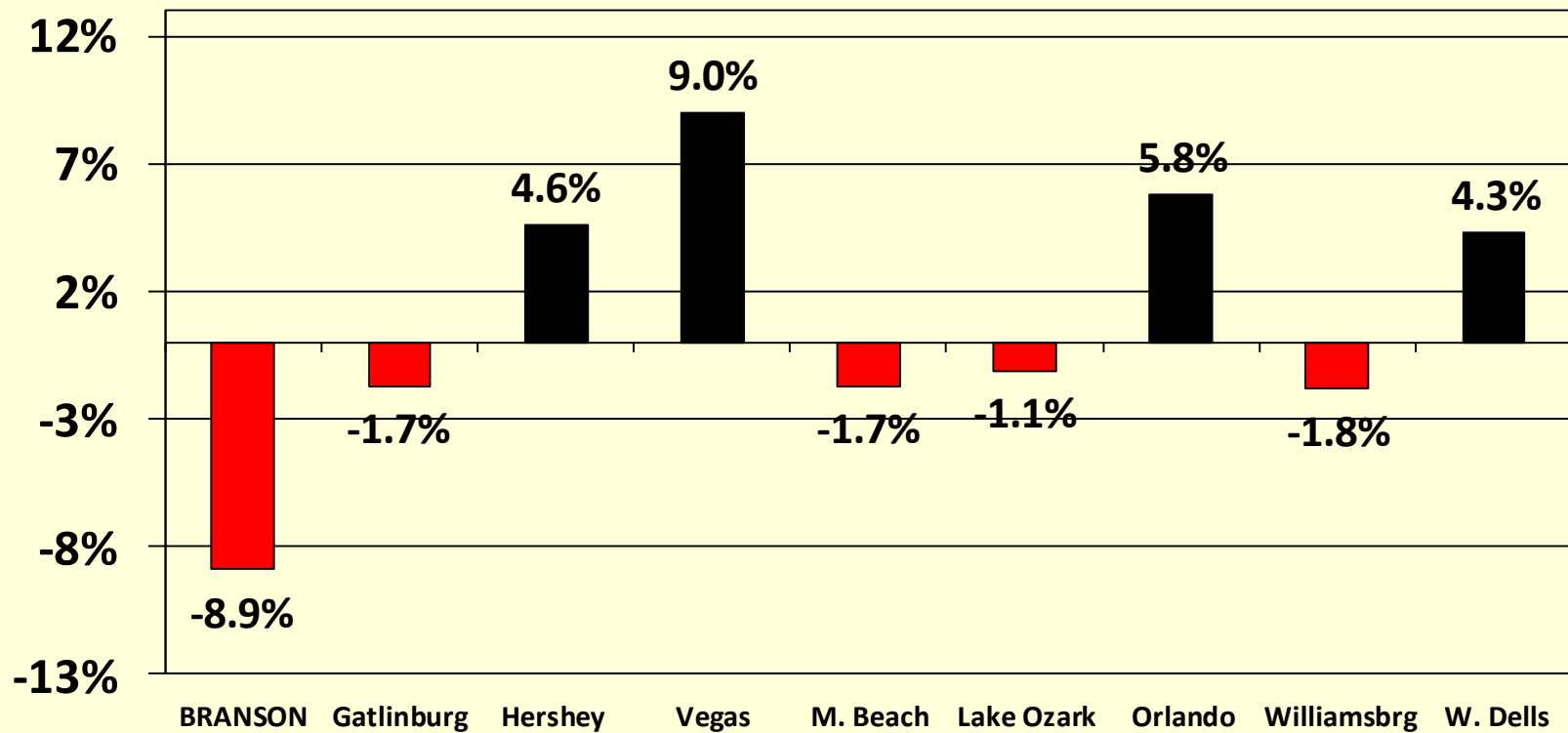
Source: City of Branson

TCED Tourism Tax YE 2007-2011



Source: TCED

Direct Competitors YE Room Demand



Source: Smith Travel Research

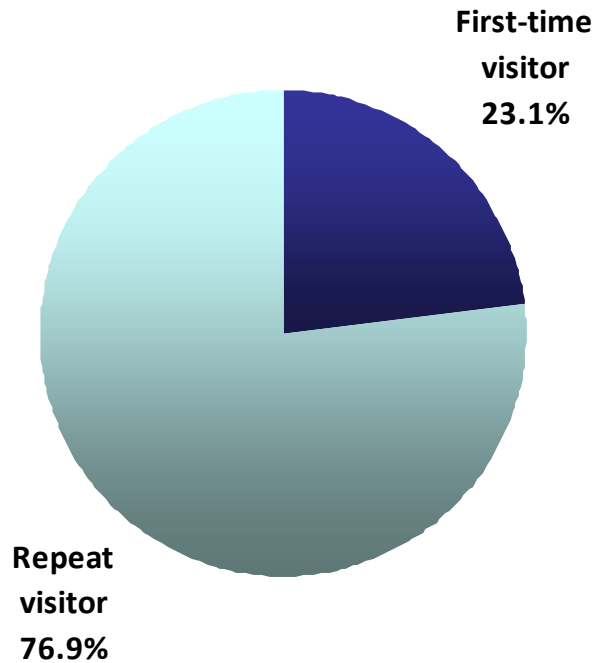
Branson Visitor Profile



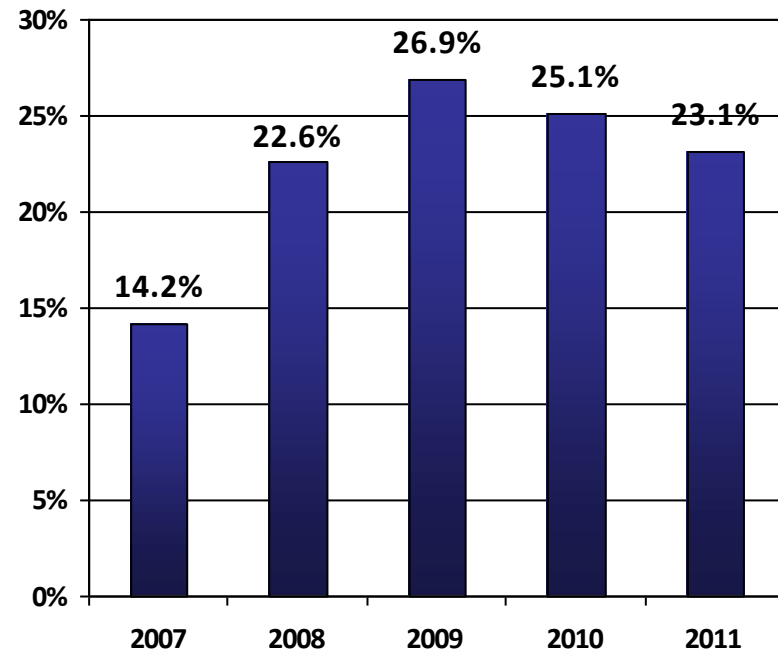
What else do we **know**
about Branson visitors in **2011**?

Last Visit

First-time visitation accounted for nearly one-quarter of Branson's visitation.

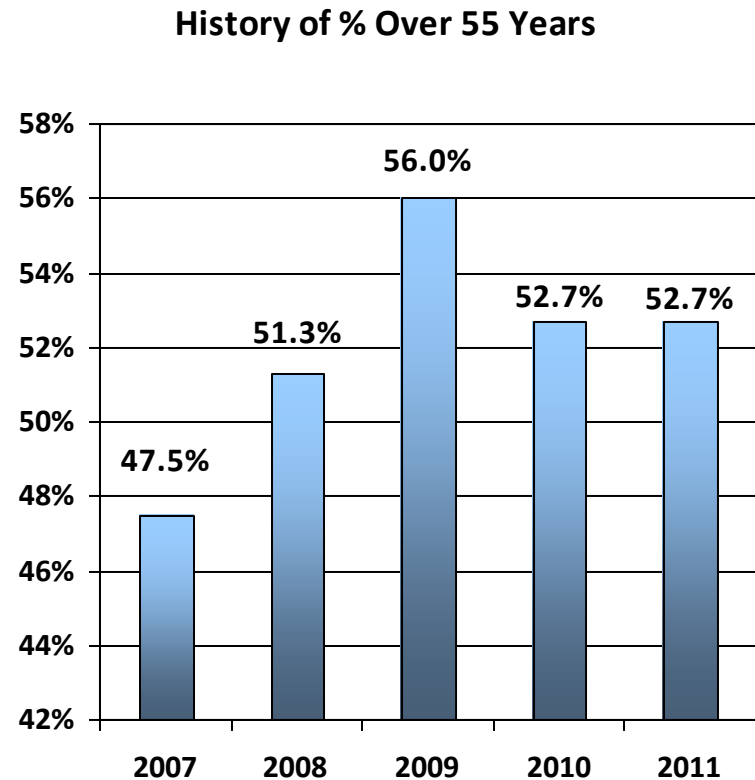
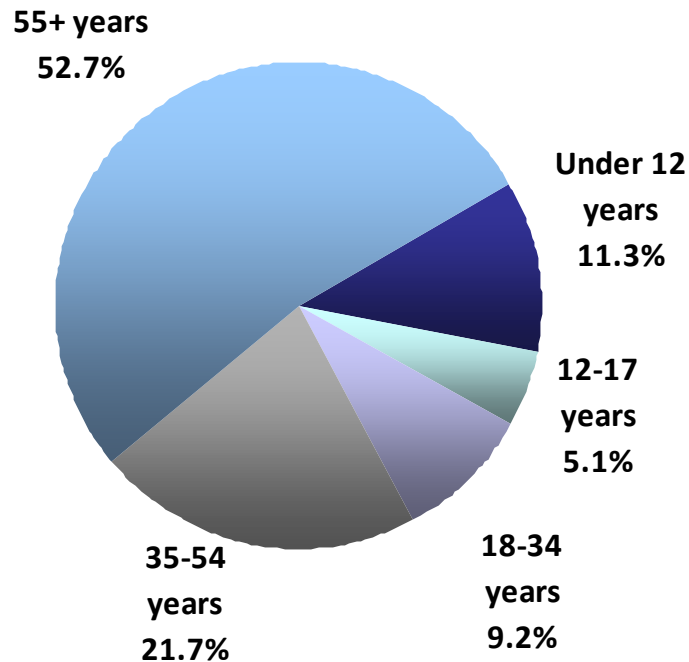


History of First-Time Visitors



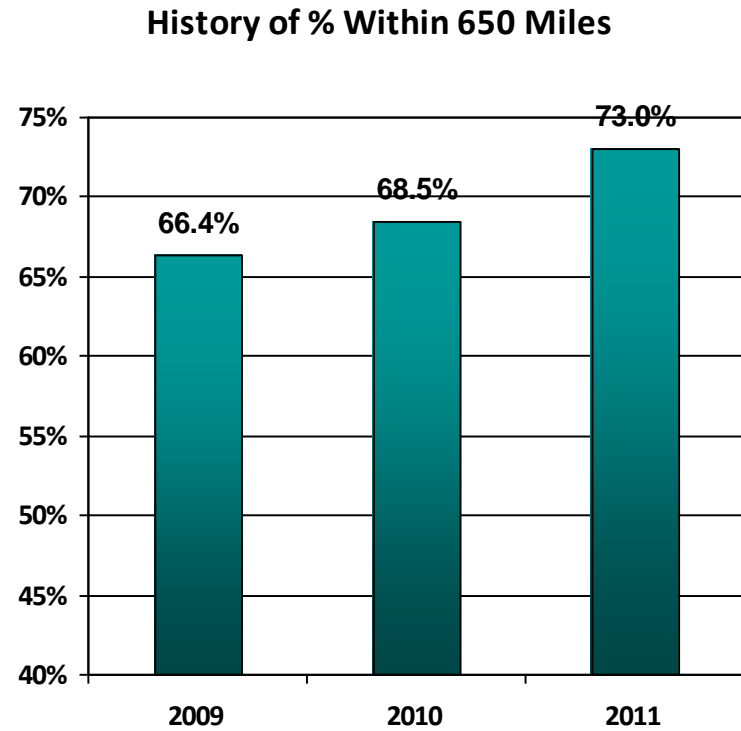
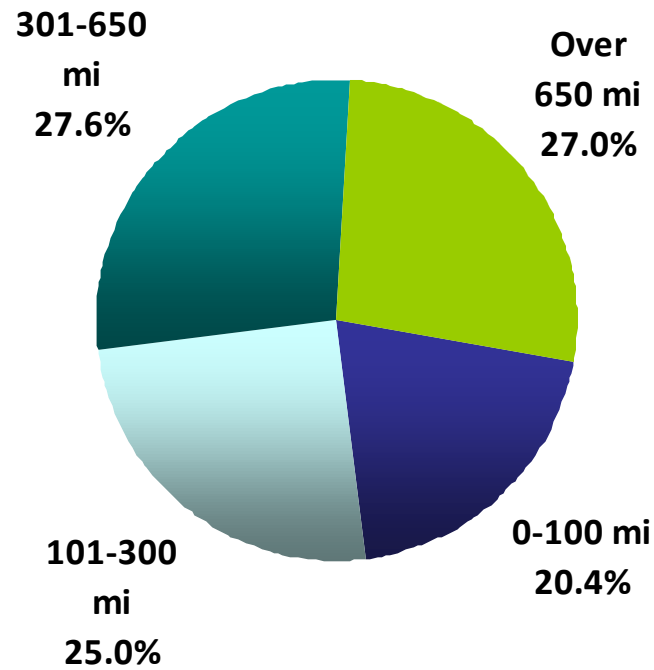
Age of Visitors

After a notable decrease last year, those over the age of 55 remain at more than half of Branson's visitation, although average adult age did decrease from 57.3 yrs. to 56.6 yrs.

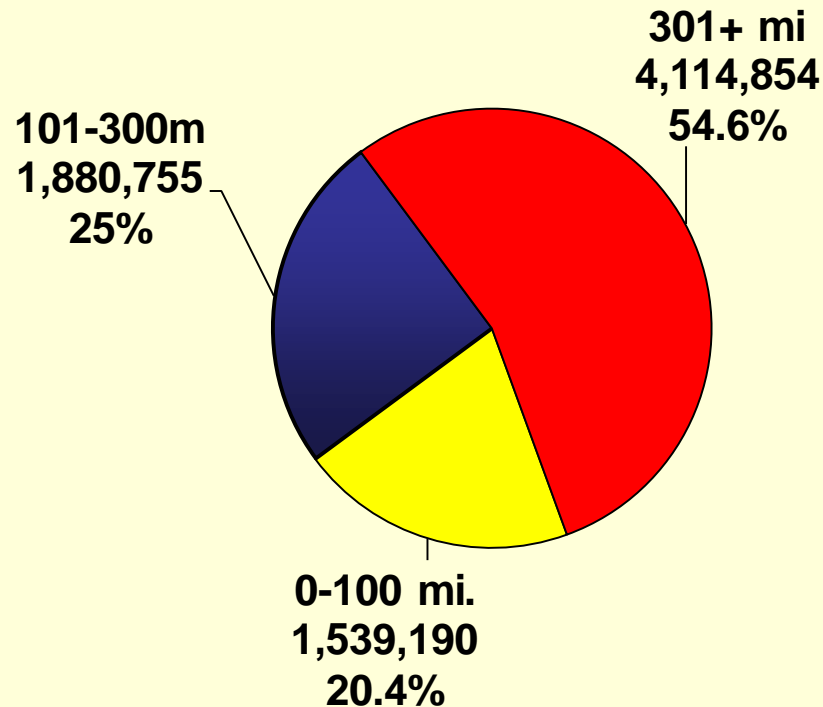


Distance Traveled

Branson has been very effective at capturing visitation from within 650 miles as travelers began shortening their trips and staying closer to home.



2011 Visitation by Distance



Source: BLACC/CVB Research Committee;
Marketsource Research Center

YE 2011 vs. YE 2010



	<u>2011</u>	<u>2010</u>
• Spending per Party	\$917	\$863
• Length of Stay	3.96	4.16
• Satisfaction	4.44	4.46
• Families	38.5%	42.8%

Market Growth YE 2011 vs. YE 2010



Core Markets (0-100 mi.)	+2.0%
Primary Markets (101-300 mi.)	-5.0%
Outer Markets (301-650 mi.)	+6.0%
National Markets (650+ mi.)	-19.0%
OVERALL VISITATION	-5.4%





BRANSON, MO 2011

Advertising Effectiveness & ROI Study





AD EFFECTIVENESS

Branson's **marketing efforts** significantly **increased advertising awareness** in 2011 which helped **drive incremental visitation** and spending, and provide us with the **best ROI** recorded in the past four years.



Rain and Floods and Tornadoes, Oh My!

Torrential rains, flooding and even the Joplin tornado plagued Southwest Missouri right in the middle of the Spring campaign's run. And, while bad weather is not uncommon in the Midwest during the Spring, **the amount of media coverage surrounding these events was far larger than normal.**

It is believed that as a result, many potential travelers consciously or unconsciously removed Branson from their consideration set for summer trips; however, **despite a challenging year, the fact is that it would have been far worse had the marketing campaign not worked as effectively as it did.**

WEATHER IMPACT

BRANSON AD EFFECTIVENESS & ROI STUDY

BP's \$60 Million Gulf Coast Ad



Another reason for Branson's poor performance was likely geographic and demographic in nature. Geographically, there was a "huge sucking sound in the Southeast corner of the country." The re-opening of the Gulf Coast coupled with a massive **\$60 million advertising campaign provided by BP** helped produce sharp increases in those states bordering the Gulf of Mexico. By some estimates, the region's business increased by nearly 30% over their best benchmark years in recent history.

Similarly, **the unparalleled success of Universal's Harry Potter experience** drew significant crowds even as the new area entered its second season. Combined, these two issues pulled many potential visitors out of some of Branson's feeder markets.

COMPETITION IN THE SOUTH

Nearly Half of Americans Impacted by Recession



Competition was not the only problem impacting Branson in 2011. Demographics were also working against us this past year.

While overall travel & tourism nationwide increased, our traditional target market (comprised largely of middle-class baby boomers) lagged behind nationwide. As J. Walker Smith of the Futures Company said at a recent tourism conference, “the marketplace has been shorn in two”—those very negatively impacted by the economy and those virtually unaffected.

CHANGING CONSUMERS



High Income Consumers Twice as Likely to Travel

According to Y-Partnership's *Portrait of American Travelers*, two-thirds (66%) of travelers earning more than \$50,000 plan to travel over the next 6 months compared to only 42% of households earning less than \$50,000 per year.

That is, higher income consumers are 54% more likely to travel than lower income consumers.

The problem is that nearly half (48%) of Branson travelers earn less than \$50,000 per year. Middle class consumers have been hit particularly hard over the past few years.

CHANGING CONSUMERS



Ad Campaign Reached 23.8M

Overall, nearly **30% of travelers nationwide recalled seeing at least one of Branson's television advertisements.** This level of ad awareness is up from the 25% generated last year, and represents a new record.

Extrapolated across the total number of travelers in these markets, it is estimated that **Branson's ad campaign reached 23.8 million traveler households this year, up 22% from the 19.6 million recorded last year.**

Likewise, despite investing a little more on media this year, **the cost per aware household decreased from \$0.16 to \$0.14,** considered extremely efficient by industry norms.

ADVERTISING AWARENESS

BRANSON AD EFFECTIVENESS & ROI STUDY



Level of Visitation/Incidence Decreased

Overall, Branson attracted 2.0% of travelers nationwide to visit Southwest Missouri this past year.

This year's decrease was driven by the decline in visitation from those unaware of Branson's ads, a segment that declined more than 20%.

LEVEL OF VISITATION

BRANSON AD EFFECTIVENESS & ROI STUDY



Travelers Give Television Ads Very High Marks

The great majority (77%) of respondents indicated that Branson's television advertisements had a positive impact on their perception of the area, and all of the key message points resonated quite well.

In fact, Branson recorded increases in every single message point tested this year. The largest gains came in the area of "good place for an adult couple to visit," "makes Branson look like a friendly place" and "makes Branson seem like an affordable destination"—all generating an increase of 0.4 or better compared to last year.

CREATIVE EVALUATION

BRANSON AD EFFECTIVENESS & ROI STUDY



Ads Generate \$291M in Incremental Spending

Reaching nearly 30% of travelers across the country and generating a very positive reaction to the ads are very important considerations, but to be effective the campaign must also **drive travelers to Branson who would not have otherwise visited.** Branson's 2011 television advertisement delivered well in this area.

This year's campaign generated 301.3k *incremental* trips to the area and produced \$291 million in incremental travel spending, up nearly \$125 million from last year. Hence, while the area may be down overall, things could have been much worse had it not been for the effectiveness of the ad campaign.

INCREMENTAL IMPACT

BRANSON AD EFFECTIVENESS & ROI STUDY

Advertising ROI Increases to \$88

Despite generating a slightly lower level of incremental visitation this year, Branson's increased ad awareness coupled with a slightly larger base of U.S. travelers was enough to propel the effectiveness of the campaign.

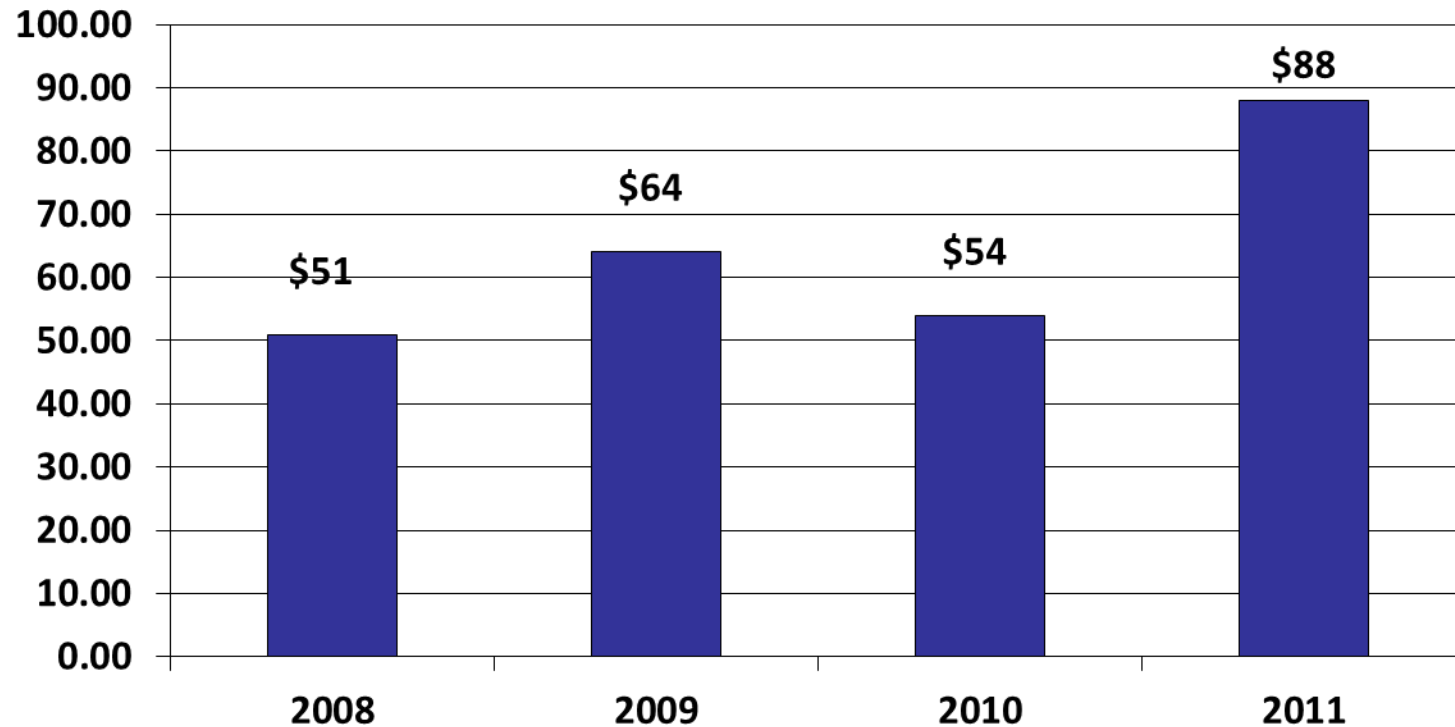
Overall, Branson's \$3.30 million ad investment generated nearly \$291 million in incremental visitor spending which equates to a return on investment of \$88, up from last year's \$54 ROI.

RETURN ON INVESTMENT

BRANSON AD EFFECTIVENESS & ROI STUDY

History of ROI

Branson's marketing efficiency, as measured by the overall campaign's ROI, has improved steadily over the past several years.





It Could Have Been Worse

Our research indicates that about 5% fewer households visited Branson in 2011. Given the economic environment and other challenging indicators, had it not been for the increase in visitation among aware households, Branson's visitation may have fallen by a significantly greater amount.

OPPORTUNITY COST

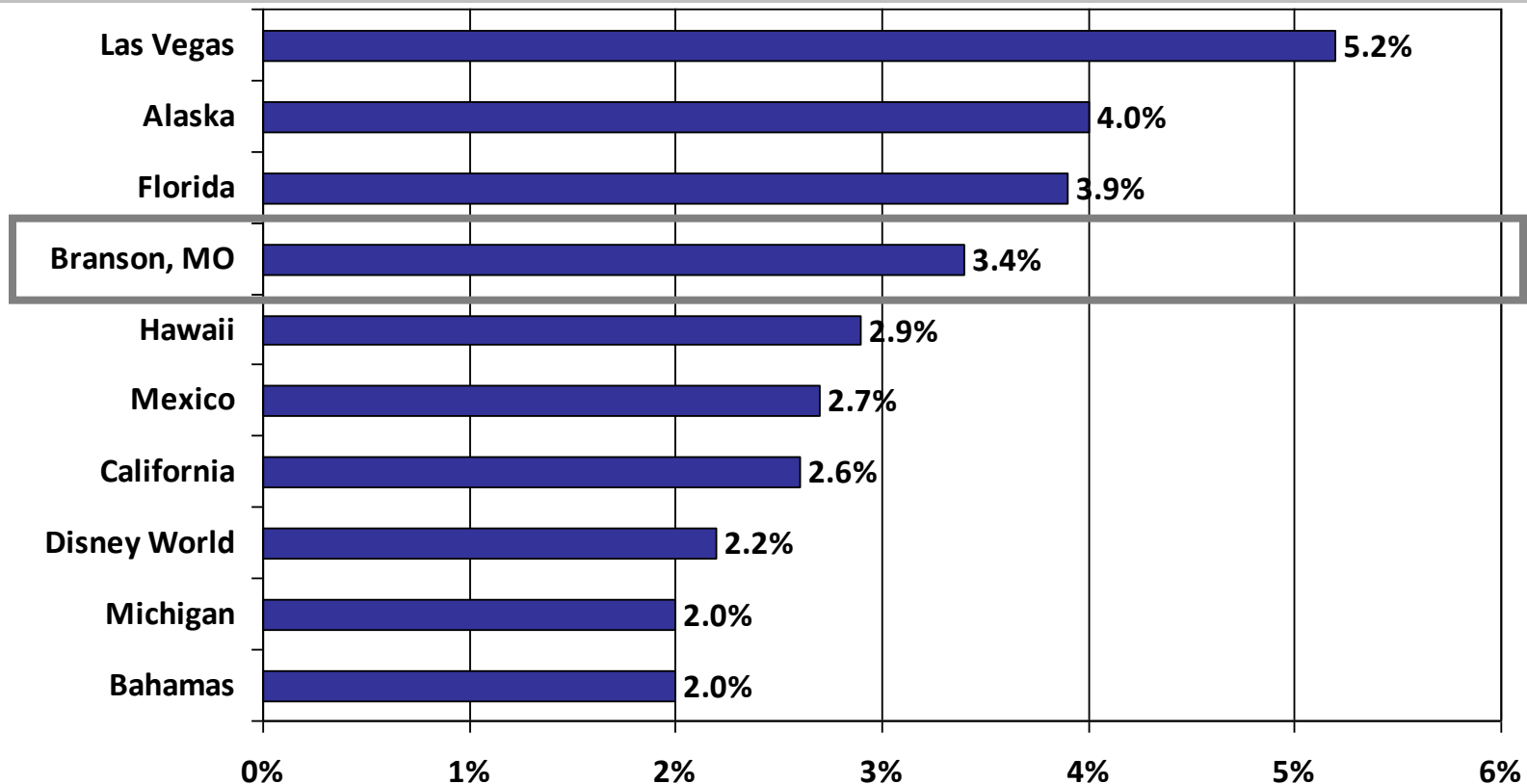
BRANSON AD EFFECTIVENESS & ROI STUDY

Branson's **brand awareness**
ranked 4th nationwide in
unaided recall behind only
Las Vegas, Alaska and
Florida.



Destinations with Highest Unaided Ad Awareness

Overall, Branson's travel ads ranked 4th in unaided recall across all three tiers of respondents. Branson ads were mentioned by 3.4% of all respondents.



Summary Metrics

	2011	2010	2009
Advertising Recall	29.4%	25.2%	23.8%
Aware Households	23.8 M	19.6 M	20.2 M
Increment	+1.3%	+1.4%	+1.8%
Incremental Trips	+301,322	+272,343	+363,987
Incremental Spending	\$290.9 M	\$166.0 M	\$269.1 M
Media Investment	\$3.30 M	\$3.05 M	\$4.22 M
ROI	\$88	\$54	\$64

Branson's 2012 Projection



+2.0%

2012 BLACVB Marketing Revenues



TOTAL MARKETING REVENUES	\$8,396,136
– TCED Tax	\$4,957,421
– City of Branson Tourism Tax	\$1,968,715
– Pubs Revenue	\$ 467,000
– MO DIV Grant (Taney)	\$ 425,000
– MO DIV Grant (Stone)	\$ 150,000
– Web Revenue	\$ 130,000
– Other Revenues	\$ 114,000
– TCED Opportunity Fund	\$ 184,000

2012 BLACVB Marketing Expenditures



TOTAL MARKETING EXPENDITURES	\$8,396,136
– Media (70%)	\$5,877,119
– Public Relations (5.4%)	\$ 450,327
– Publications (4.6%)	\$ 382,500
– Trade Media Advertising (4.1%)	\$ 341,412
– Dues and Sponsorships (3.4%)	\$ 283,847
– Trade Shows (3.2%)	\$ 267,435
– M & C Opportunity Fund (2.2%)	\$ 184,000
– Research (1.8%)	\$ 150,000
– City-Sponsored Programs (1.3%)	\$ 110,000
– Teleresponse (1.2%)	\$ 105,326
– All other Programs (3%)	\$ 244,170

2012 Media Budget



TOTAL MEDIA EXPENDITURES	\$5,877,119
– Television (76%)	\$4,467,119
– Web (12.8%)	\$ 750,000
– Print/Outdoor (4.2%)	\$ 245,000
– Radio/Other (0.26%)	\$ 15,000
– Table Rock Project (5.1%)	\$ 300,000
 SUBTOTAL PAID MEDIA (98.3%)	 \$5,777,119
 – Creative Services (1.7%)	 \$ 100,000
TOTAL	\$5,877,119

Strategic Alliances



latitude

Camelot Communications Clients



Table Rock Lake Area Chamber of Commerce

Branson Media Strategy



- **NATIONAL (Cable TV, Web, PR):** Create/maintain broad demand for Branson brand as *national* destination – *covers all DMA's in the U.S.*
- **PRIMARY MARKETS (TV, Radio, Web, Print, PR):** Maintain/create demand in *regional* drive markets – Kansas City, St. Louis, Little Rock, Tulsa, Ft. Smith, Oklahoma City
- **CORE MARKETS (TV, Radio, Web, Print, PR):** Encourage *local* visitation during Ozark Mountain Christmas/Winter -- Springfield and Joplin
- **OPPORTUNITY MARKETS:** Respond specifically to current economic and industry trends, e.g., Southwest, 300-600 mile markets

2012 Branson Media Strategy



2012 OPPORTUNITY MARKETS:

- (1) Specifically, continue to target additional spot television in 6 markets between 300-650 miles identified by Branson Potential Market Study by H2R**
- (2) Participate in co-op television/radio projects to promote both drive and air visitation from the Chicago and Houston DMA's in conjunction with announcement of non-stop AirTran/Southwest service directly into Branson**

[illegible]



Branson



refresh

rethinking
the Branson
brand strategy

sterling brands March 17, 2011



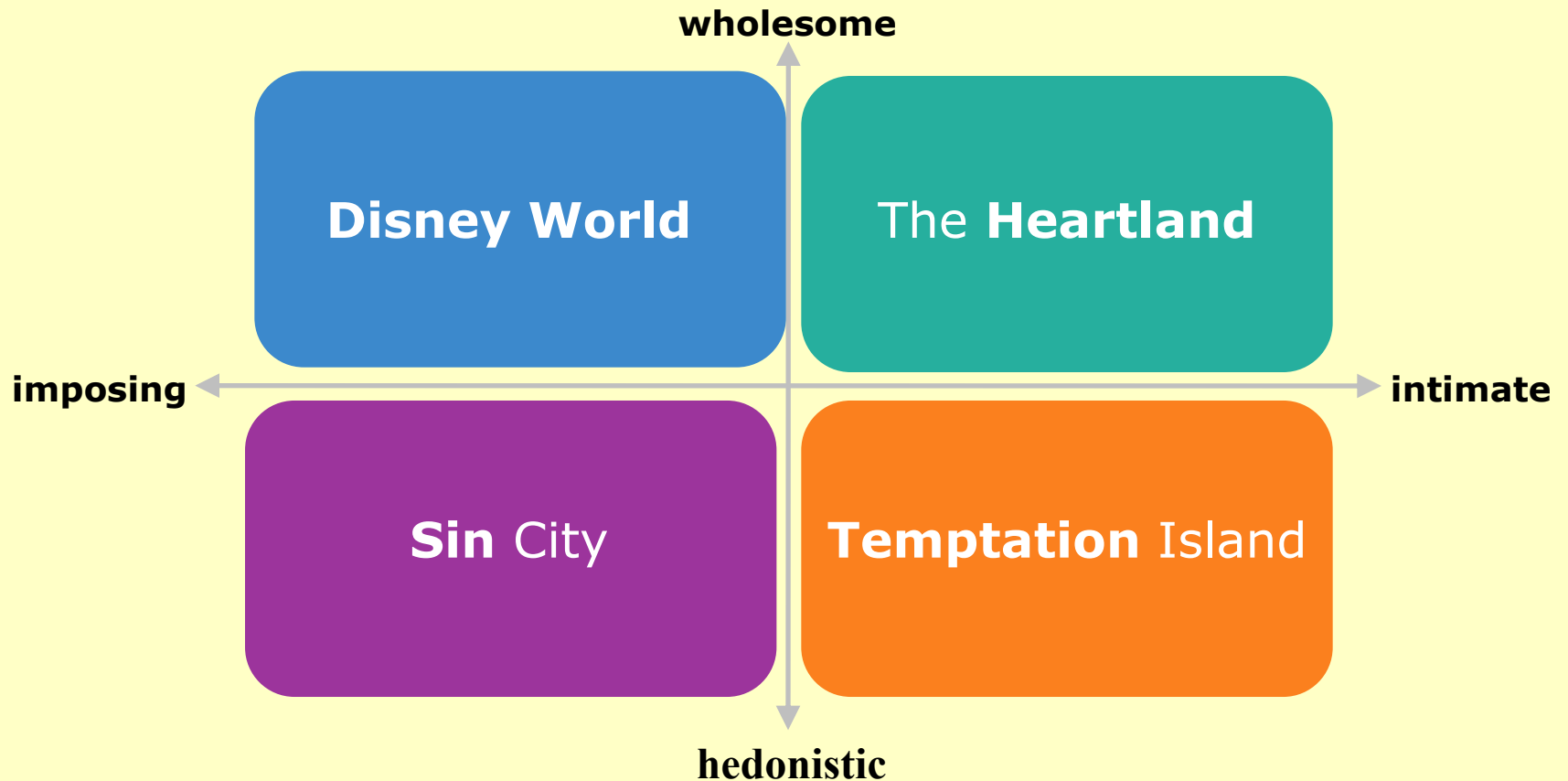
2012 Branding Update

Our updated brand strategy is to more clearly position Branson as a *wholesome, intimate and authentic alternative to Las Vegas, Orlando and other tourism destinations* in order to appeal to Boomer couples, younger adults and families (by season -- Spring Break and Summer).





A look at the marketplace from a POV perspective





Meet Christi, our muse

Our muse is the person we're designing Branson for and whom our audience thinks we're built for, i.e. ,our "typical" visitor

Our muse paints the picture of the most dynamic, interesting and compelling archetype within our audience



vitals

- 49 years old
- married to her high school sweetheart
- mother of 2 grown children
- suburban Kansas City

“

I volunteer a lot of time at my church, helping as a 'mom mentor'.

I'm a Midwestern lady, which means I've got a strong sense of values that I'm willing to stand up for.

nobody ever wants 'spent a lot of time at the office' on their tombstone – life is for living.

I like to keep active – I make my husband go with me for evening walks after dinner. I hike regularly with my girlfriends and just started taking yoga classes.

I love to travel. we go on a few short 'couples' trips a year, and then we try someplace new, just the two of us. last year it was NYC, but my dream trip would be Paris.

”



2012: Building up to the Branson position

bonding

wholesome

intimate

variety

welcoming

fun

entertainment
that brings us
together

Consumer Trends

- **Contentment.** Fun and spontaneity have been snatched away from us and we want it back! **We want meaning in our lifestyles.** It's no longer about accumulating stuff. It's about doing more in a broader context of things that really matter to us. **Small is getting bigger.**
 - All the risk, all the stuff we used to do and used to collect is no longer as important as it used to be. **We're replacing all that stuff with internal commitment which is rooted in relationships.** We're moving from a definition of fun that originated from externally directed accumulation culture to an internally directed contentment culture. **Today, it's more about people than possessions.**
-

Consumer Trends

These findings align well with our 2012 marketing campaign -- ***Branson. It's Your Show.*** -- which focuses on the bonding of our visitors during their Branson experience. It's more about getting closer to those you love than about all the things you can do or buy.

Creative Agency



latitude

- Based in Dallas, TX
- Affiliated with The Richards Group
- Full-service capabilities
- Extensive experience
- Branding
- Multiple industries



Agency Clients



Go RVing®



WeightWatchers®

Snapple®

NORTEL
Business made simple



Cabela's®
WORLD'S FOREMOST OUTFITTER

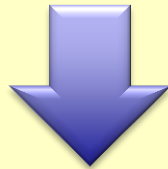


CHURCHILL DOWNS

Branson Brand Position: Single Most Persuasive Idea



Entertainment that brings us together.



Connect with people you love in Branson,
the heartland of wholesome fun.



Campaign Objectives

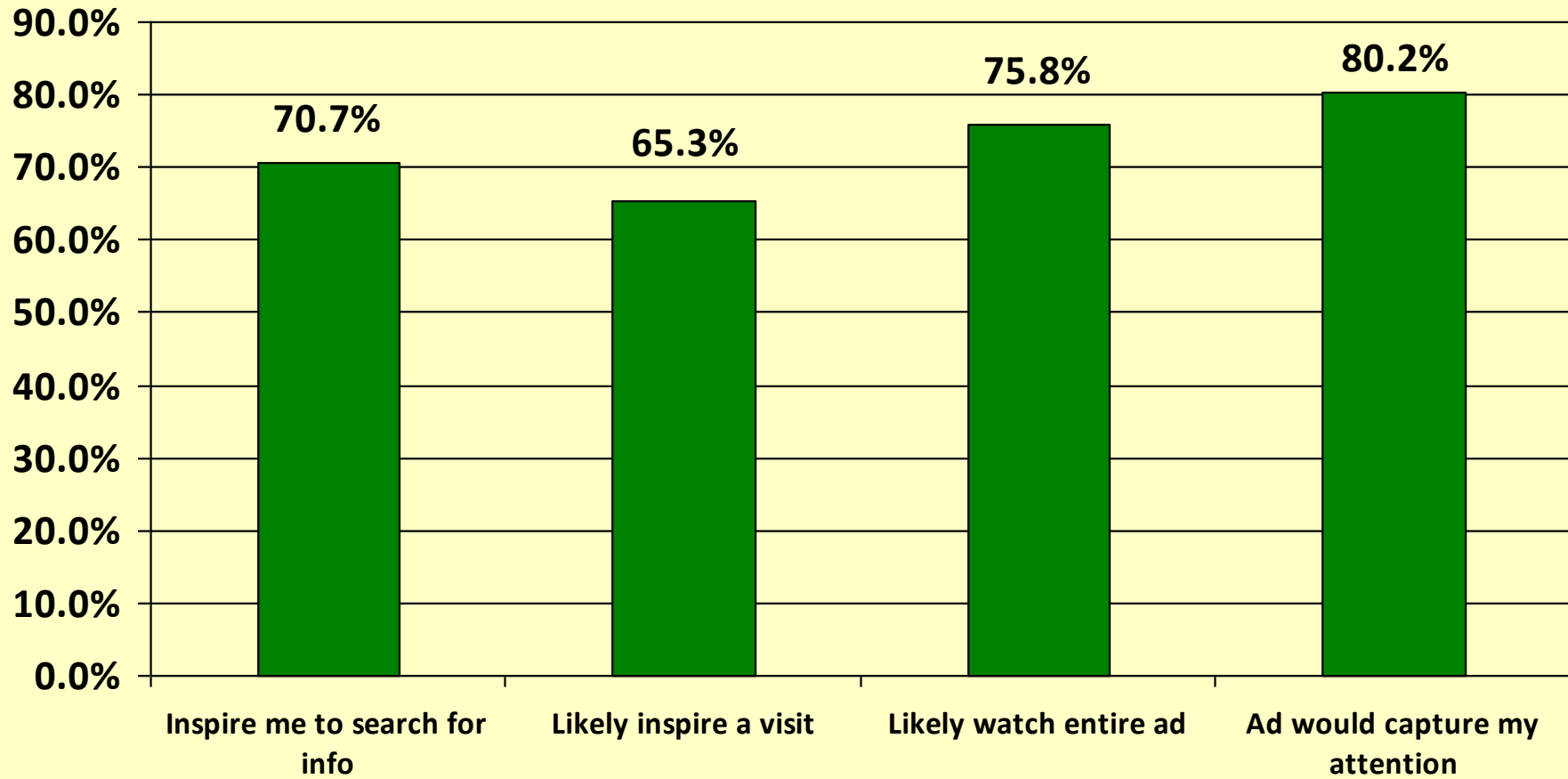
- New brand campaign must not only portray Branson but give you the feeling of being here
- Give an up-close-and-personal experience
- Connect emotionally to fulfill a need
- Offer a surprise to offset any misperceptions
- Intrigue enough for Christi to act



2011 Focus Group Responses to Creative Message



Respondents liked this creative because it shows “people enjoying themselves with multiple things to do” and liked the “romance of the couple enjoying each other and their surroundings.”





It's Your Show

2012 BRANSON VACATION GUIDE

LIVE SHOWS • PRISTINE LAKES • WORLD CLASS ATTRACTIONS

WELCOME TO BRANSON
LET'S HAVE SOME FUN!
JIM STAFFORD SHOW

CARLTON COMIC
LEAVES
AT 10:00

NEAL MCCOY

#1 HITS OF THE 60s

Lodge of the Ozarks

The Annual Branson

He I Come Home

Mickey Gilley

SIX

877-BRANSON

BRANSON
It's Your Show


ExploreBranson.com

BRANSON/LAKES AREA CHAMBER OF COMMERCE AND CONVENTION & VISITORS BUREAU



DISCOVER THE JOY OF BEING TOGETHER WHEN YOU TAKE

CENTER STAGE

Visit Branson and explore a lively destination that's built for excitement, recreation, relaxation and escape—but above all, discover a place where everything is centered around you and those closest to you. Set the stage for your trip at ExploreBranson.com.

FEATURING OVER 100 LIVE SHOWS • SILVER DOLLAR CITY • TITANIC MUSEUM ATTRACTION • PRISTINE LAKES
BRANSON LANDING • FISHING • BOATING • MUSEUMS • SPAS • GOLF • ZIPLINES
OUTLET SHOPPING • DINING • RESORTS • HISTORIC DOWNTOWN

877-BRANSON

BRANSON
It's Your Show



SHARE THE SPIRIT AND WARMTH OF

An Ozark Mountain Christmas

A holiday stay in Branson is the gift that connects you with loved ones. From the Festival of Lights to the largest Northern Hemisphere Thanksgiving celebration in the country to one hundred evening shows, no other destination captures the spirit of the season—and captures your heart—quite like Branson. Set the stage for your trip at ExploreBranson.com.

HOW TO ENJOY YOUR TRIP: VISIT SILVER DOLLAR CITY • TITANIC MUSEUM • PRISTINE LAKES
BRANSON LANDING • FISHING • BOATING • MUSEUMS • SPAS • GOLF • ZIPLINES
OUTLET SHOPPING • DINING • RESORTS • HISTORIC DOWNTOWN

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It's Your Show

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ExploreBranson.com



exploreBranson.com

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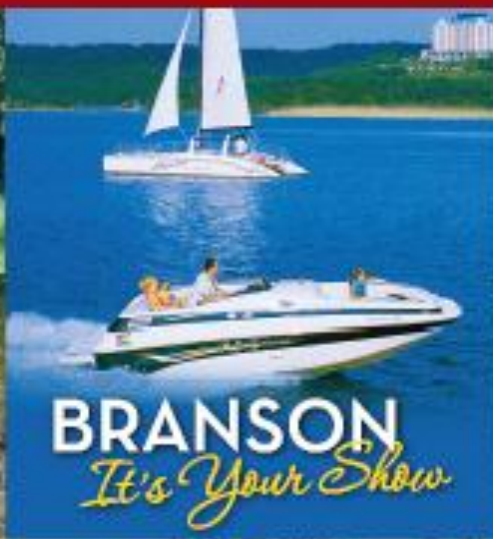
CHAMBER OF COMMERCE



ExploreBranson.com



Hiking



BRANSON
It's Your Show



Jet Skiing



Fishing



R/V Campgrounds



Award-Winning Golf Courses

BRANSON

CHAMBER OF COMMERCE



100+ Shows

Branson Landing

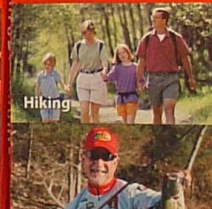


BRANSON
It's Your Show



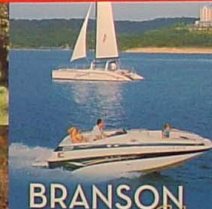
40+ Theatres

BOYER DOLLAR CITY



Hiking

Fishing



BRANSON
It's Your Show



Jet Skiing

R/V Campgrounds

BRANSON

CHAMBER OF COMMERCE



NEW IN BRANSON
BRANSON
Landing

Discover Uncharted
Shopping and Dining

FREE
VACATION GUIDES
BRANSON





Things to Do | Where to Stay | About Branson | Groups & Conventions | Resources | Five Seasons of Branson

go

BRANSON

It's Your Show



Featured



Branson turns 100 in 2012
Celebrate with us as we honor our history with a year of special centennial events and deals. Visit Branson100.org for info.



Fly to Branson
Get special deals on [AirTran Airways](#) from Houston and Chicago. Or explore other [low-cost flights](#) and airlines!



Save with Branson Hot Deals
Area shows, attractions, lodging properties and other businesses are offering [money-saving deals](#) to ExploreBranson.com visitors!



10 Great Places to Discover
TripAdvisor's members have named Branson one of [10 Great Places for Families to Discover](#) in the United States.

MY BRANSON VACATION

Arrive:
Depart:
[Start Planning](#)

Free Vacation Guide



Get instant access to the [2012 Branson Travel Planner](#), or request your free copy in the mail.

Become an Insider

Sign up to receive the free [Branson eConnection](#) e-mail newsletter.

In The News

[MasterCraft Pro Wakeboard Tour Announces 2012 Schedule](#)

[Lilleys' Landing Team Trout Tournament](#)

[Titanic Museum Attractions](#)

Today in Branson

Festivals & Events

Early Shows

Evening Shows

Attractions

Today's Festivals & Events

[Titanic's Rose Petal Memorial Tribute](#)
Through Apr. 10 at Titanic Museum Attraction

[Survivor's Wall of Stories](#)
Through Sep. 30 at Titanic Museum Attraction

[Complete Branson Calendar of Events](#)

Branson. It's Your Show.

It's time to raise the curtain on an extraordinary vacation.

Whether you're celebrating family time together, escaping with that special someone or reconnecting with your closest friends, you and your co-stars are about to discover a destination designed to put you center stage.

After all, there's no place that brings people together like Branson.



Featured



Branson turns 100 in 2012

Celebrate with us as we honor our history with a year of special centennial events and deals. Visit Branson100.org for info.



Fly to Branson

Get special deals on [AirTran Airways](#) from Houston and Chicago. Or explore other [low-cost flights](#) and airlines!



Save with Branson Hot Deals

Area shows, attractions, lodging properties and other businesses are offering [money-saving deals](#) to ExploreBranson.com visitors!



10 Great Places to Discover

TripAdvisor's members have named Branson one of [10 Great Places for Families to Discover](#) in the United States.

MY BRANSON VACATION

Arrive:

Depart:

[Start Planning](#)

Free Vacation Guide



Get instant access to the [2012 Branson Travel Planner](#), or request your free copy in the mail.

Become an Insider

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In The News

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ExploreBranson.com - Branson, Missouri

www.explorebranson.com/m

For quick access, place your bookmarks here on the bookmarks bar. Other bookmarks

 Home Explore Search








Today in Branson

Today's Events and Festivals

Shows in Branson Today

Attractions Open Today

     0

MY BRANSON VACATION Start Planning My Vacation

Branson. It's Your Show.

It's time to raise the curtain on an extraordinary vacation.

BRANSON
It's Your Show

Whether you're celebrating family time together, escaping with that special someone or reconnecting with your closest friends, you and your co-stars are about to discover a destination designed to put you center stage.

After all, Branson is a place that brings people together like

2012 TV Creative



Target

Season

Adult/Couple

Spring/Summer/Fall

Girlfriends

Spring/Summer/Fall

Family

Spring/Summer

Multi-generational

Christmas

All spots finish with target visitors on stage applauded by Branson entertainers and tourism personnel... *Branson. It's Your Show.

2012 Television Spots



2012 Strategic Plan



1. Execute strong brand strategy with Sterling Group (brand image), Camelot Communications (media), and Latitude (new creative campaign) to drive visitation to the Branson/Lakes area.
2. Increase Public Relations Ad Equivalency with Geiger and Buffalo agencies/fam tours
3. Drive convention/group business with aggressive sales efforts utilizing opportunity fund and military/family reunion initiatives





Thank you.